



**A MARKET PROFILE OF
OVERSEAS VISITORS TO CALIFORNIA
2002**



California Tourism

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**EXECUTIVE SUMMARY
OVERSEAS VISITORS TO CALIFORNIA
(2002)**

- **Total Overseas Market.** There were approximately 19.0 million overseas visitors to the U.S. in 2002, down from 22.0 million in 2001. An estimated 4.1 million of these overseas visitors (21.2%) indicated California was a destination on their U.S. trip, down 15 percent from 4.8 million overseas visitors to California in 2001.
- **Country of Origin.** California's top five overseas visitor market countries were:

	Number of California Visitors		Percent of Total California Visitors	
	<u>2001</u>	<u>2002</u>	<u>2001</u>	<u>2002</u>
Japan	849,000	653,000	18%	16%
United Kingdom	631,000	660,000	13%	16%
Australia/New Zealand	310,000	256,000	6%	6%
South Korea	286,000	256,000	6%	6%
Germany	271,000	236,000	6%	6%

Japan and the UK make up almost one-third of the overseas visitors to California. In the past, Japan has represented the largest proportion of California's overseas visitors, however this year Japan dropped by 23%, leaving room for the UK to increase its representation among California's overseas tourists.

- **Market Share.** California's share of total overseas visitors to the U.S. has decreased with respect to visitors from Japan, Germany, South Korea, and Australia/New Zealand, and has increased for visitors from the UK.

	California Market Share of Total U.S. Visitors	
	<u>2001</u>	<u>2002</u>
Japan	21%	18%
United Kingdom	15%	17%
Australia/New Zealand	54%	50%
South Korea	46%	45%
Germany	21%	20%

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- **Main Destination.** Approximately three in four (73%) overseas visitors to California indicated that California was their main destination, similar to that reported in previous years.
- **California MSAs Visited.** As with last year, the most common Metropolitan Statistical Areas (MSAs) visited by overseas visitors to California included Los Angeles - Long Beach (57%) and San Francisco (41%), followed by San Diego (11%), San Jose (9%) and Anaheim-Santa Ana (8%).
- **Purpose of Trip.** People travel overseas to California mostly for vacation (55%, down 4% from 2001), visiting friends/relatives (41%) and business (36%). Compared to other overseas travelers, visitors from Japan (41%), South America (43%), and Taiwan (42%) have the highest proportion of business travelers, while visitors from the UK (69%), Germany (63%), France (63%), and Italy (65%) have the highest proportion of travelers on vacation/holiday. Australia/New Zealand (50%) and Taiwan (53%) are more likely to visit friends/relatives than any other overseas visitors to California.

Over the past year shifts have occurred in the make-up of some of California's overseas travelers, specifically among Japanese, Australian, and French visitors. The proportion of vacation travelers to California from Japan and Australia/New Zealand has dropped 10%. Business travel from France to California has declined from 44% in 2001 to 29% this year.

- **Economic Downturn and Post 9-II Impact.** While overseas visitor volume to California increased 30 percent in the fourth quarter of 2002 compared with 2001, this result was still 31 percent lower than the peak in the fourth quarter 2000. A significantly higher proportion of visitors to California in the fourth quarter 2002 than the fourth quarter 2001 visited for the purpose of vacation/holidays (59% versus 54% respectively), and a significantly lower proportion visited for business/ professional reasons (42% versus 47% respectively).
- **Leisure/Recreation Activities.** Consistent with previous years, shopping (85%), dining (83%) and sightseeing (49%) were the most common leisure and recreation activities of overseas visitors to California in 2002. Once again, there was a high proportion of visitors from the UK who reported dining in restaurants (94%).
- **Use of Travel Agents.** Almost two-thirds (64%) of California's overseas visitors used a travel agent to make airline reservations while only 25 percent used a travel agent to make lodging arrangements. These percentages were similar to those from previous years. During 2002, California visitors from France, the U.K. and Germany tended to rely less on travel agents for booking airline reservations than did other national groups.
- **Accommodations.** In 2002, almost three-quarters of overseas travelers to California reported staying in hotels or motels at some time during their trip (74%), similar to the result from 2001. Visitors from Japan and the U.K. reported the highest hotel usage of visitor groups (83% and 82% respectively). Over the past year the proportion of French travelers staying in hotels/motels dropped significantly from 85% in 2001 to 65% in 2002, a result that is not surprising, considering their decline in business travel.

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- **Sex and Age.** Two-thirds (67%) of overseas travelers to California during 2002 were adult males, and one-third (33%) were adult females. Results were similar in previous years. During 2002, the average age of traveling adult males (43 years old) was four years older than the average traveling adult female (39 years old).
- **Length of Stay.** During 2002, California's overseas visitors spent an average of 21 nights in the U.S. and 10 nights in California. The average length of stay has increased by 2 nights in the U.S. and decreased by 1 night in California compared with 2001. Nationalities were varied in their length of stay, with visitors from the Japan spending the least amount of time in the U.S. (12 nights) and visitors from Australia/New Zealand staying the longest amount of time in the U.S. (24 nights). From 2001 to 2002, length of stay in California has declined from 12 to 9 nights respectively among French travelers. Of California's visitors, travelers from Japan and the U.K. averaged the shortest length of stay (8 nights each respectively) and, similar to the previous year, visitors from Taiwan reported the longest stay (14 nights).
- **Fourth Quarter Decrease.** There was a decrease in the average length of stay in the U.S. as well as California from the fourth quarter 2001 to the fourth quarter 2002 (23 nights to 19 nights each respectively in the U.S., and 12 nights to 9 nights each respectively in California).
- **Use of Domestic Airlines and Rental Cars.** Almost four in ten overseas visitors to California used a taxi/cab/limousine (40%), airlines in the U.S. (38%) or a rental car (37%) for transportation within the U.S. Visitors from Germany, France and Italy were most likely to rent an auto, while visitors from South Korea were least likely. Similar to 2001 results, visitors from South America as well as those from Australia/New Zealand were the most likely to fly between cities while visitors from France were least likely.
- **Advance Trip Decision.** The average overseas visitor to California decides to travel a median of 30 days prior to the actual trip. In 2002 visitors from the U.K. took the longest time to plan their trip to California (median = 90 days), while visitors from South Korea took the shortest time (median = 22 days).
- **Advance Ticket Purchase.** Overseas visitors to California purchased their airline ticket a median of 21 days prior to the actual trip. Visitors from Taiwan reported the shortest time frame from airline reservation to departure date (median of 10 days) and visitors from the U.K. (median of 47 days) and Germany (median of 35 days) reported the longest time frame from airline reservation to departure. More than one-third (37%) of travelers purchased their tickets within two weeks of departure.
- **Travel Party Size.** Consistent with results from the previous year, the average travel party size for all overseas visitors to California during 2002 was 1.5 people.
- **Prepaid Trip Package.** Package tours were used by only 12 percent of all 2002 visitors to California, slightly lower than that reported in 2001 and 2000 (14% and 18% respectively). During 2002, visitors to California reporting the highest use of inclusive tours were from the U.K. and France (18% and 16% respectively).

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- **Expenditures in the U.S. – “All to California” Visitors.** Expenditures in the U.S. during 2002 continue to decline from 2000, averaging \$88 per person per day (average expenditure in 2001 was \$102 per day; and in 2000 the average was \$115 per day). In 2002, overseas visitors' total trip expenditures averaged \$3,438 compared with \$3,605 in 2001 and \$3,845 in 2000. Visitors to California from Japan (\$142) followed by visitors from France and Italy (\$119 and \$114 respectively), reported the highest average daily expenditures.
- **Expenditures - "California Only" Visitors.** Visitors to the U.S. who only visited California had total trip expenditures averaging \$3,118. Their average daily expenditures in the U.S. (\$99) were the same as those reported in 2001, but remain lower than those reported in 2000 (\$112).

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OVERSEAS VISITORS TO CALIFORNIA*
SELECTED HIGHLIGHTS
(2002)

	All Visitors	Japan	United Kingdom	Germany	Australia New Zealand	South America	France	Taiwan	South Korea	Italy	Fourth Quarter 2001	Fourth Quarter 2002
Estimated Travelers	4,053,000	653,000	660,000	236,000	256,000	185,000	190,000	184,000	256,000	93,000	720,000	933,000
Business (% Change 2001/2002)	36% (-0-)	41% (+8%)	27% (+1%)	35% (-3%)	38% (+9%)	43% (+8%)	29% (-15%)	42% (+7%)	31% (-15%)	26% (-6%)	42% N/A	36% N/A
Vacation (% Change 2001/2002)	55% (-4%)	49% (-10%)	69% (-6%)	63% (+3%)	57% (-10%)	48% (-9%)	63% (-5%)	50% (-7%)	54% (+4%)	65% (-2%)	54% N/A	59% N/A
Adv. Trip Decision (mean days)	70.5	44.9	112.1	101.6	99.8	55.8	95.3	35.5	34.3	57.5	69.4	68.4
Adv. Air Decision (mean days)	42.3	26.7	78.0	63.3	53.7	34.7	63.6	18.0	12.9	36.8	43.5	42.8
Mean Travel Party Size	1.5	1.5	1.6	1.4	1.4	1.3	1.6	1.5	1.3	1.6	1.4	1.4
Median Male Age (years)	42	44	43	41	43	41	46	40	30	41	40	42
Median Female Age (years)	37	37	40	38	40	41	32	36	32	34	38	37
Mean Household Income (\$000)	\$83	\$92	\$96	\$90	\$73	\$61	\$79	\$73	\$68	\$81	\$78	\$83
Nights CA (mean) (median) (Change in mean nts 2001/2002)	9.7 5.0 (-1 nt)	7.9 4.0 (-.5 nt)	7.9 5.0 (-.5 nt)	10.7 7.0 (+2 nts)	10.1 5.0 (-0-)	12.9 7.0 (+3 nts)	8.5 6.0 (-3.5 nts)	13.6 6.0 (+1 nt)	9.2 4.0 (-0-)	9.5 7.0 (-0-)	11.6 5.0 N/A	9.2 5.0 N/A
Hotel/Motel	74%	83%	82%	79%	75%	72%	65%	59%	70%	79%	71%	74%
Private Home	34%	20%	29%	32%	32%	37%	37%	49%	32%	27%	38%	33%
Rental Car	37%	34%	38%	57%	33%	35%	50%	33%	19%	50%	44%	37%
Mean Total Trip Exp. (Change in mean trip exp 2001/2002)	\$3,438 (-\$167)	\$3,514 (+\$310)	\$3,355 (-\$174)	\$3,610 (-\$379)	\$4,145 (+\$613)	\$3,530 (+\$130)	\$3,452 (+\$784)	\$3,437 (+\$292)	\$2,606 (-\$1,167)	\$2,805 (-\$868)	\$3,773 N/A	\$3,509 N/A
Est. State Spending Impact	\$3,460 Mil.	\$733 Mil.	\$469 Mil.	\$222 Mil.	\$220 Mil.	\$243 Mil.	\$192 Mil.	\$268 Mil.	\$89 Mil.	\$101 Mil.	\$835 Mil.	\$858 Mil.

*Does not include Canadian or Mexican visitors.

Source: ITA/OTTI, Survey of International Air Travelers, 2002

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OVERSEAS LEISURE VISITORS TO CALIFORNIA*
SELECTED HIGHLIGHTS
(2002)

	All Visitors	Japan	United Kingdom	Germany	Australia New Zealand	South America	France	Taiwan	South Korea	Italy	Fourth Quarter 2001	Fourth Quarter 2002
Estimated Travelers	2,226,000	322,000	466,000	129,000	146,000	86,000	136,000	86,000	132,000	55,000	362,000	522,000
Business	5%	2%	4%	3%	10%	7%	8%	3%	11%	1%	8%	5%
Vacation	78%	83%	85%	88%	75%	68%	80%	70%	93%	82%	76%	80%
Adv. Trip Decision (mean days)	90.0	54.8	133.1	135.8	124.6	76.0	106.4	42.3	31.9	70.6	100.1	83.8
Adv. Air Decision (mean days)	56.0	35.7	98.8	84.0	65.7	48.5	70.5	21.9	12.5	44.5	64.2	56.1
Mean Travel Party Size	1.6	1.7	1.8	1.5	1.6	1.4	1.7	1.6	1.4	1.9	1.5	1.6
Median Male Age (years)	42	38	45	39	42	37	48	45	33	38	42	44
Median Female Age (years)	38	37	43	38	42	42	32	35	36	34	42	40
Mean Household Income (\$000)	\$77	\$79	\$86	\$75	\$62	\$58	\$62	\$71	\$68	\$76	\$74	\$78
Nights CA (mean)	11	8	9	10	11	21	8	15	13	12	12	10
(median)	7	4	6	8	6	10	6	7	4	7	7	6
Hotel/Motel	66%	74%	80%	69%	70%	57%	56%	43%	58%	78%	64%	65%
Private Home	44%	33%	31%	45%	36%	56%	40%	67%	46%	31%	47%	42%
Rental Car	36%	30%	39%	58%	34%	33%	54%	26%	6%	57%	39%	31%
Mean Total Trip Expenditure	\$2,668	\$2,311	\$2,613	\$2,911	\$3,148	\$2,897	\$2,904	\$3,021	\$2,701	\$2,931	\$3,041	\$2,751

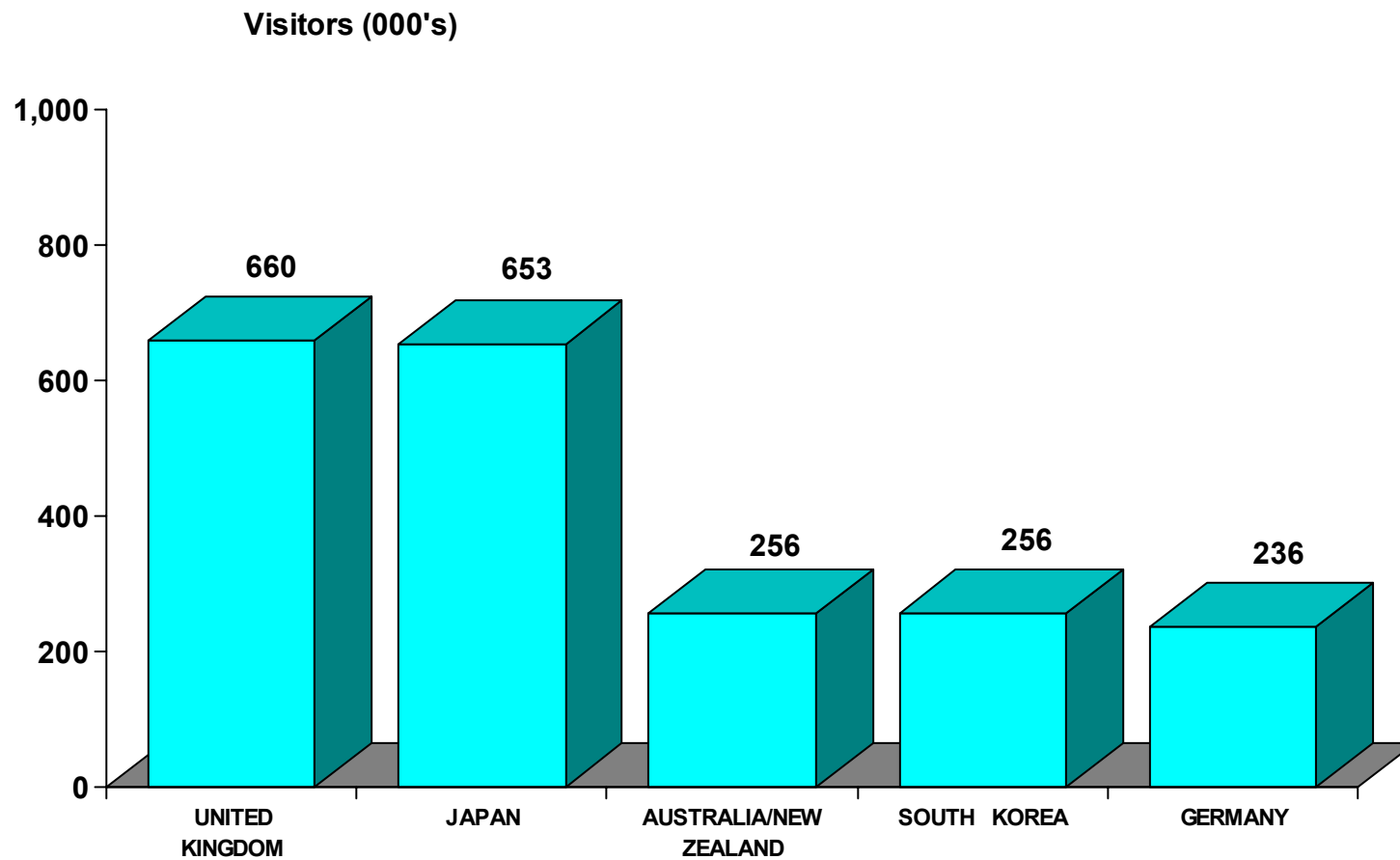
*Does not include Canadian or Mexican visitors.

Source: ITA/OTTI, Survey of International Air Travelers, 2002
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TOP FIVE COUNTRIES OF RESIDENCE

OVERSEAS VISITORS TO CALIFORNIA

(2002)



Source: ITA "In-Flight" Survey, 2002
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Table 1
RESIDENCE OF VISITORS TO THE UNITED STATES AND CALIFORNIA
(2002)

Residence of Visitors	UNITED STATES		CALIFORNIA		
	Num. Of Visitors To The U.S.	Percent Of Total U.S. Visitors	Number Of Visitors To California	Percent Of California Total	CA Share Of Visitors From This Country
EUROPE	8,602,684	45.0%	1,654,000	40.8%	19.2%
W. EUROPE	8,247,779	43.1%	1,605,000	39.6%	19.5%
Austria	97,930	0.5%	26,000	0.6%	26.6%
Belgium	159,052	0.8%	22,000	0.5%	13.9%
Denmark	118,716	0.6%	32,000	0.8%	27.0%
France	734,260	3.8%	190,000	4.7%	25.9%
Germany	1,189,856	6.2%	236,000	5.8%	19.8%
Ireland	259,687	1.4%	57,000	1.4%	21.8%
Italy	406,160	2.1%	93,000	2.3%	22.8%
Netherlands	384,367	2.0%	85,000	2.1%	22.1%
Norway	112,593	0.6%	29,000	0.7%	25.4%
Spain	269,520	1.4%	27,000	0.7%	9.9%
Sweden	204,156	1.1%	43,000	1.1%	21.0%
Switzerland	253,940	1.3%	65,000	1.6%	25.6%
United Kingdom	3,816,736	20.0%	660,000	16.3%	17.3%
Other Western Europe	240,806	1.3%	45,000	1.1%	18.7%
E. EUROPE	354,905	1.9%	39,000	1.0%	11.0%
CARIBBEAN	1,052,576	5.5%	28,000	0.7%	2.7%
Bahamas	262,469	1.4%	4,000	0.1%	1.5%
Dominican Rep	153,586	0.8%	6,000	0.1%	4.2%
Jamaica	183,903	1.0%	3,000	0.1%	1.6%
Trinidad & Tobago	118,336	0.6%	1,000	0.0%	1.1%
Other Caribbean	334,282	1.7%	16,000	0.4%	4.8%

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Table 1
RESIDENCE OF VISITORS TO THE UNITED STATES AND CALIFORNIA (Cont.)
(2002)

Residence of Visitors	UNITED STATES		CALIFORNIA		
	Num. Of Visitors To The U.S.	Percent Of Total U.S. Visitors	Number Of Visitors To California	Percent Of California Total	CA Share Of Visitors From This Country
SOUTH AMERICA	1,815,230	9.5%	185,000	4.6%	10.2%
Argentina	164,658	0.9%	19,000	0.5%	11.3%
Brazil	405,094	2.1%	79,000	1.9%	19.4%
Chile	115,359	0.6%	20,000	0.5%	17.5%
Colombia	321,439	1.7%	16,000	0.4%	4.9%
Ecuador	139,094	0.7%	11,000	0.3%	8.2%
Peru	164,482	0.9%	12,000	0.3%	7.5%
Venezuela	395,913	2.1%	14,000	0.3%	3.6%
Other South America	109,191	0.6%	14,000	0.3%	12.8%
CENTRAL AMERICA	704,050	3.7%	82,000	2.0%	11.7%
Costa Rica	124,993	0.7%	14,000	0.3%	11.0%
Guatemala	162,367	0.8%	17,000	0.4%	10.3%
Honduras	85,322	0.4%	2,000	0.0%	2.4%
Panama	75,495	0.4%	10,000	0.2%	13.0%
Other Central America	255,873	1.3%	40,000	1.0%	15.6%
AFRICA	241,223	1.3%	39,000	1.0%	16.1%
Morocco	12,464	0.1%	1,000	0.0%	4.3%
South Africa, Rep. of	73,910	0.4%	14,000	0.3%	18.6%
Nigeria	40,128	0.2%	1,000	0.0%	3.2%
Other Africa	114,721	0.6%	16,000	0.4%	13.9%
OCEANIA	529,089	2.8%	263,000	6.5%	49.6%
Australia	407,130	2.1%	199,000	4.9%	49.0%
New Zealand	109,580	0.6%	57,000	1.4%	52.0%
Other Oceania	12,379	0.1%	1,000	0.0%	8.1%

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Table 1
RESIDENCE OF VISITORS TO THE UNITED STATES AND CALIFORNIA (Cont.)
(2002)

Residence of Visitors	UNITED STATES		CALIFORNIA		
	Num. Of Visitors To The U.S.	Percent Of Total U.S. Visitors	Number Of Visitors To California	Percent Of California Total	CA Share Of Visitors From This Country
FAR EAST	5,689,292	29.8%	1,657,000	40.9%	29.1%
Hong Kong	135,409	0.7%	74,000	1.8%	54.9%
India	257,271	1.3%	87,000	2.1%	34.0%
Indonesia	45,811	0.2%	26,000	0.6%	57.7%
Japan	3,627,264	19.0%	653,000	16.1%	18.0%
Korea, South	638,697	3.3%	256,000	6.3%	44.7%
People's Republic of China	225,565	1.2%	120,000	3.0%	53.0%
Philippines	173,203	0.9%	118,000	2.9%	68.1%
Republic of China	288,032	1.5%	184,000	4.5%	63.9%
Singapore	97,259	0.5%	54,000	1.3%	55.1%
Thailand	66,848	0.3%	36,000	0.9%	53.9%
Other Far East	133,933	0.7%	58,000	1.4%	43.3%
MIDDLE EAST	482,468	2.5%	68,000	1.7%	14.2%
Egypt	24,315	0.1%	.	.	.
Israel	263,097	1.4%	42,000	1.0%	16.1%
Saudi Arabia	25,588	0.1%	4,000	0.1%	16.2%
Turkey	78,662	0.4%	10,000	0.2%	12.2%
Other Middle East	90,806	0.5%	16,000	0.4%	17.6%
TOTAL OVERSEAS VISITORS	19,116,707	100.0%	4,053,000	100.0%	21.2%
(Number of Respondents)	(29,310)		(8,089)		

*World Regions are independantly estimated and may not sum to Total Overseas Visitors.

Source: ITA Survey of International Air Travelers, 2002.

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Table 2
OVERSEAS VISITORS TO CALIFORNIA AND SHARE
OF TOTAL U.S. MARKET BY COUNTRY
(1991 - 2002)

Share of Overseas Visitors to the U.S.

<u>Year</u>	<u>All Overseas</u>	<u>All Europe</u>	<u>Germany</u>	<u>United Kingdom</u>	<u>France</u>	<u>Italy</u>	<u>Other Europe</u>
1991	32.4%	31.9%	37.2%	26.6%	34.8%	38.8%	31.9%
1992	27.8%	28.4%	33.8%	22.9%	25.7%	34.0%	30.6%
1993	26.9%	26.0%	29.5%	22.1%	27.6%	27.8%	27.2%
1994	27.0%	27.0%	29.5%	23.6%	26.6%	28.4%	30.3%
1995	25.7%	26.5%	30.7%	20.5%	27.8%	30.2%	29.0%
1996	26.5%	26.6%	28.6%	21.2%	29.8%	30.2%	29.6%
1997	26.6%	26.0%	26.7%	21.9%	29.5%	33.0%	28.1%
1998	25.2%	24.8%	26.5%	21.2%	34.3%	31.7%	23.9%
1999	25.5%	24.1%	26.4%	19.2%	33.6%	30.3%	24.2%
2000	24.5%	21.0%	22.1%	16.3%	30.4%	27.2%	22.7%
2001	22.2%	18.2%	20.6%	15.4%	24.5%	24.9%	18.2%
2002	21.2%	19.2%	19.8%	17.3%	25.9%	22.8%	19.3%

Estimated Volume of Visitors to California

<u>Year</u>	<u>All Overseas</u>	<u>All Europe</u>	<u>Germany</u>	<u>United Kingdom</u>	<u>France</u>	<u>Italy</u>	<u>Other Europe</u>
1991	5,024,000	2,348,000	532,000	664,000	268,000	186,000	698,000
1992	4,946,000	2,346,000	572,000	647,000	204,000	201,000	722,000
1993	5,020,000	2,244,000	539,000	663,000	233,000	155,000	654,000
1994	4,984,000	2,297,000	479,000	654,000	219,000	150,000	719,000
1995	5,304,000	2,330,000	567,000	592,000	256,000	159,000	756,000
1996	6,015,000	2,592,000	571,000	688,000	295,000	159,000	879,000
1997	6,436,000	2,701,000	532,000	815,000	289,000	191,000	874,000
1998	5,972,000	2,647,000	504,000	843,000	348,000	194,000	758,000
1999	6,239,000	2,709,000	524,000	816,000	356,000	190,000	823,000
2000	6,365,000	2,430,000	394,000	766,000	330,000	166,000	774,000
2001	4,847,000	1,733,000	271,000	631,000	215,000	118,000	498,000
2002	4,053,000	1,654,000	236,000	660,000	190,000	93,000	475,000

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Table 2 - (Continued)
OVERSEAS VISITORS TO CALIFORNIA AND SHARE
OF TOTAL U.S. MARKET BY COUNTRY
(1991 - 2002)

Share of Overseas Visitors to the U.S.

<u>Share</u>	<u>Asia</u>	<u>Japan</u>	<u>South Korea</u>	<u>Hong Kong</u>	<u>Taiwan</u>	<u>Other Far East</u>	<u>Australia</u>	<u>South America</u>
1991	37.9%	29.8%	42.9%	68.4%	73.2%	57.8%	62.1%	15.5%
1992	30.9%	21.5%	39.2%	62.9%	66.4%	74.1%	60.7%	12.1%
1993	34.3%	23.2%	55.5%	58.3%	68.9%	51.1%	61.5%	11.0%
1994	31.6%	20.3%	48.8%	58.2%	66.2%	55.7%	63.2%	13.5%
1995	30.0%	20.4%	39.9%	57.8%	61.7%	54.1%	62.2%	10.5%
1996	31.3%	22.5%	32.9%	58.0%	64.8%	55.8%	59.1%	13.7%
1997	32.1%	23.4%	39.0%	60.0%	65.3%	53.1%	57.2%	15.1%
1998	31.6%	23.0%	52.0%	54.5%	66.2%	50.3%	58.5%	15.1%
1999	31.9%	22.4%	61.5%	58.7%	60.0%	45.9%	58.6%	13.2%
2000	33.2%	21.8%	63.3%	62.1%	59.6%	49.9%	60.7%	11.6%
2001	32.5%	20.8%	46.3%	60.8%	65.0%	53.6%	52.1%	11.5%
2002	29.1%	18.0%	44.7%	54.9%	63.9%	49.0%	49.0%	10.2%

Estimated Volume of Visitors to California

<u>Estimates</u>	<u>Asia</u>	<u>Japan</u>	<u>South Korea</u>	<u>Hong Kong</u>	<u>Taiwan</u>	<u>Other Far East</u>	<u>Australia</u>	<u>South America</u>
1991	1,735,000	989,000	119,000	122,000	196,000	309,000	292,000	244,000
1992	1,690,000	785,000	134,000	120,000	213,000	438,000	296,000	214,000
1993	1,772,000	822,000	227,000	112,000	256,000	355,000	276,000	223,000
1994	1,754,000	772,000	243,000	113,000	244,000	382,000	257,000	285,000
1995	1,985,000	938,000	236,000	127,000	255,000	429,000	264,000	257,000
1996	2,347,000	1,168,000	246,000	141,000	268,000	524,000	274,000	336,000
1997	2,488,000	1,256,000	291,000	133,000	289,000	519,000	287,000	427,000
1998	2,125,000	1,124,000	189,000	116,000	256,000	440,000	270,000	334,000
1999	2,212,000	1,081,000	307,000	113,000	272,000	443,000	283,000	361,000
2000	2,508,000	1,105,000	419,000	126,000	273,000	585,000	327,000	342,000
2001	2,054,000	849,000	286,000	104,000	232,000	583,000	222,000	291,000
2002	1,657,000	653,000	256,000	74,000	184,000	490,000	199,000	185,000

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INTRODUCTION

This report on overseas visitors to California is based on data compiled from the 2002 Office of Travel & Tourism Industries (ITA - OTTI) "Survey of International Air Travelers." The survey is conducted by CIC Research, Inc. in cooperation with over 50 major airlines on a sample of their international flights departing from U.S. airports. The survey information is collected from passengers through questionnaires covering traveler demographics, trip activities, places visited and travel expenditures. This survey program was initiated in response to a growing need for information on the volume, characteristics, and travel patterns of international air travelers to and from the United States. The data from the survey are used to guide planning oriented toward the activities of international air travelers for both the public and private sectors.

More than 8,000 survey respondents reported a California visit in 2002. This is a very robust sample size, providing a unique opportunity to evaluate the characteristics of the international visitor market. However, since airline participation is voluntary, and varies from quarter to quarter, certain country level data should be viewed cautiously. For example, if a major carrier for a particular market was unable to participate for a quarter, the data for that market may not fully represent the market's international travel to California. Also, it should be noted that this report includes the format change as instituted in 2001. This change shows the comparison of results from the fourth quarter 2001 with the fourth quarter 2002, thereby highlighting potential post 9-11 market shifts.

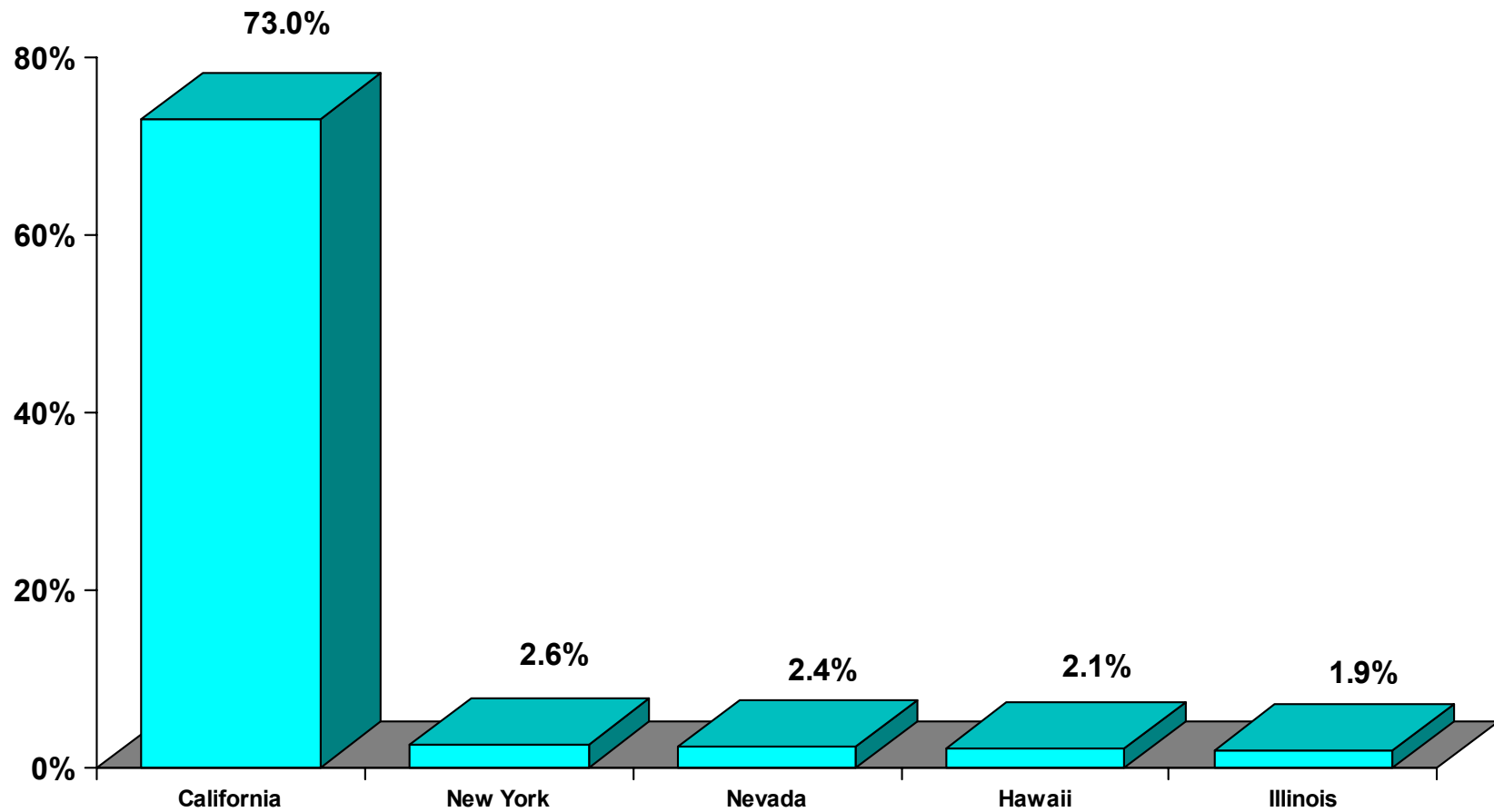
With the exception of the number of respondents, all the data in the tables are statistical estimates, based on responses to the survey and supplemented with data from the Immigration and Naturalization Service. Passengers on most charter flights and persons traveling by air between the U.S. and Canada are excluded. A more detailed explanation of the survey methodology appears in Appendix A and a copy of the survey questionnaire in Appendix B.

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**OVERSEAS VISITORS TO CALIFORNIA
(2002)**

MAIN STATE DESTINATION OVERSEAS VISITORS TO CALIFORNIA (2002)



Source: ITA "In-Flight" Survey, 2002
CIC Research, Inc.

Table 3

**MAIN DESTINATION BY STATE
OVERSEAS VISITORS TO CALIFORNIA
(2002)**

- Three in four (73%) overseas visitors to California indicated that California was their main destination on their U.S. trip.
- Of all overseas visitors to California, the Italians (81%) and Taiwanese (80%) reported the highest proportion of main destination California.

MAIN DESTINATION*	COUNTRY OF RESIDENCE OF VISITORS										FOURTH QUARTER 2001	FOURTH QUARTER 2002
	TOTAL OVERSEAS	JAPAN	U.K.	GERMANY	AUSTRALIA/ NEW ZEALAND	SOUTH AMERICA	FRANCE	TAIWAN	SOUTH KOREA	ITALY		
ESTIMATED TRAVELERS	4,053,000	653,000	660,000	236,000	256,000	185,000	190,000	184,000	256,000	93,000	720,000	933,000
(Number of Respondents)	(6,098)	(1,291)	(729)	(286)	(812)	(329)	(161)	(940)	(75)**	(81)**	(1,080)	(1,463)
California	73.0%	79.3%	67.7%	78.3%	48.7%	71.4%	78.8%	80.1%	69.4%	80.6%	71.2%	70.5%
New York	2.6	2.1	2.3	0.4	8.4	1.1	3.0	2.1	-	6.2	1.9	4.2
Nevada	2.4	3.4	5.0	1.4	1.9	3.3	0.2	3.0	-	0.6	2.9	4.1
Hawaiian Islands	2.1	3.6	3.3	2.5	0.7	-	0.6	0.9	2.2	0.2	2.2	1.6
Illinois	1.9	0.9	0.4	0.5	1.2	1.0	-	0.7	12.6	0.9	0.9	1.6
Florida	1.7	0.3	2.7	0.6	4.7	5.5	-	0.6	-	-	1.1	2.2
Arizona	1.2	0.8	1.8	2.6	0.6	1.7	1.6	0.1	-	6.9	1.4	1.2

*Visitors may report only one destination -- States with less than 1% response were not listed.

**Caution - Small sample size

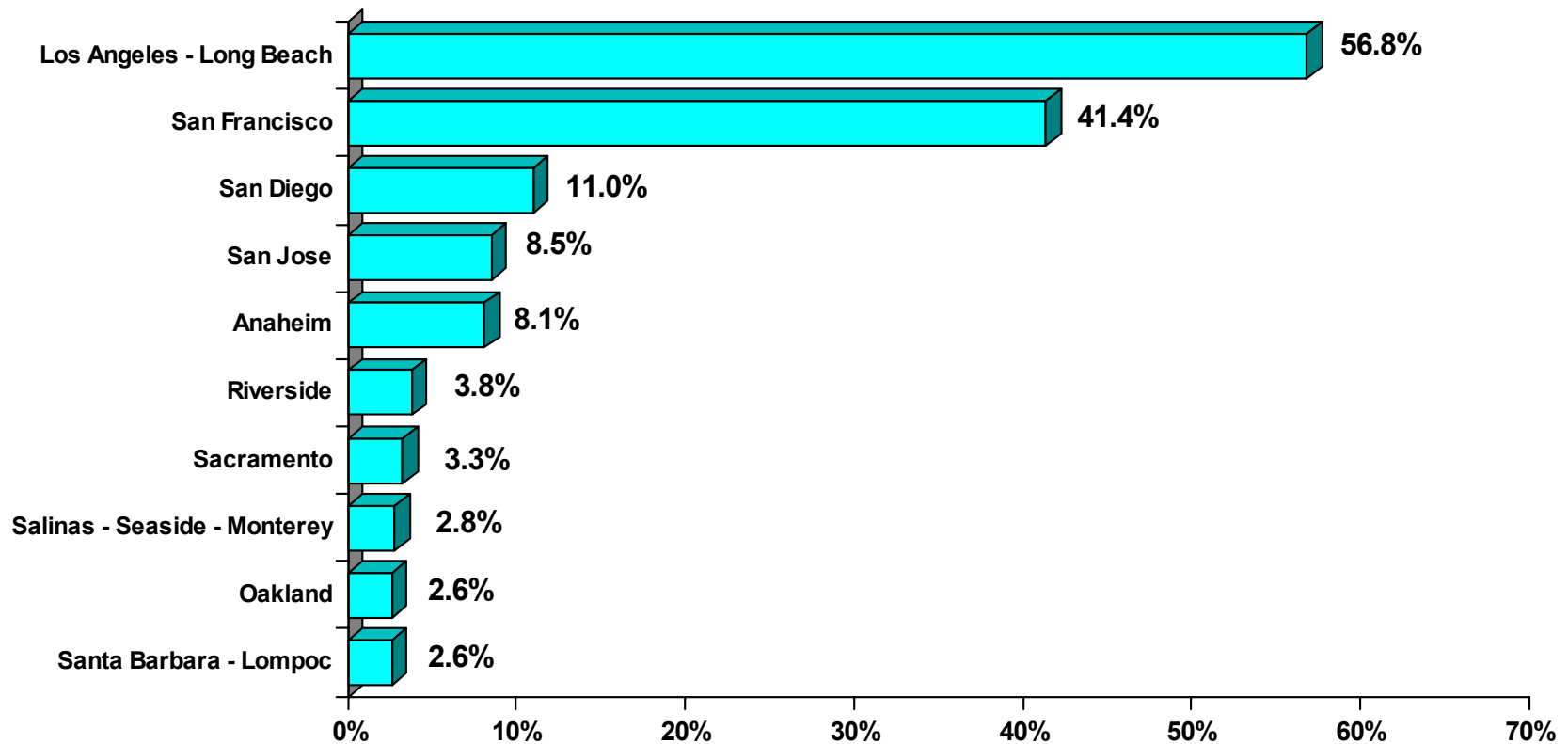
Source: ITA/OTTI Survey of International Air Travelers, 2002.

CIC Research, Inc.

TOP TEN MSA DESTINATIONS

OVERSEAS VISITORS TO CALIFORNIA

(2002)



Source: ITA "In-Flight" Survey, 2002
CIC Research, Inc.

Table 4

**CALIFORNIA MSAs VISITED
OVERSEAS VISITORS TO CALIFORNIA*
(2002)**

- The most common Metropolitan Statistical Areas (MSAs) visited by overseas visitors to California were once again Los Angeles – Long Beach (57%), San Francisco (41%), San Diego (11%), San Jose (9%), and Anaheim – Santa Ana (8%).

METROPOLITAN STATISTICAL AREA*	TOTAL OVERSEAS	COUNTRY OF RESIDENCE OF VISITORS									FOURTH QUARTER 2001	FOURTH QUARTER 2002
		JAPAN	U.K.	GERMANY	NEW ZEALAND	SOUTH AMERICA	FRANCE	TAIWAN	SOUTH KOREA	ITALY		
ESTIMATED TRAVELERS (Number of Respondents)	4,053,000 (7,959)	653,000 (1,666)	660,000 (890)	236,000 (365)	256,000 (1,109)	185,000 (405)	190,000 (198)	184,000 (1,236)	256,000 (97)**	93,000 (103)	720,000 (1,407)	933,000 (1,895)
Los Angeles-Long Beach	2,302,000 56.8%	402,000 61.5%	372,000 56.3%	107,000 45.2%	166,000 64.9%	116,000 62.6%	85,000 44.7%	115,000 62.6%	141,000 55.1%	47,000 50.6%	428,000 59.4%	546,000 58.5%
Universal Studios	45,000 1.1%	8,000 1.3%	7,000 1.0%	- 0.2%	3,000 1.2%	- -	- -	3,000 1.4%	4,000 1.6%	- -	5,000 0.7%	10,000 1.1%
Hollywood	45,000 1.1%	11,000 1.7%	9,000 1.4%	2,000 0.7%	- 0.7%	3,000 1.8%	- -	1,000 0.6%	1,000 0.5%	- -	9,000 1.3%	7,000 0.7%
San Francisco	1,678,000 41.4%	186,000 28.5%	307,000 46.5%	123,000 52.1%	76,000 29.8%	56,000 30.3%	112,000 58.9%	67,000 36.4%	134,000 52.5%	58,000 61.9%	281,000 39.0%	382,000 40.9%
San Diego	446,000 11.0%	67,000 10.2%	77,000 11.7%	38,000 16.3%	28,000 11.0%	24,000 12.9%	23,000 12.2%	12,000 6.6%	4,000 1.4%	20,000 21.5%	78,000 10.8%	87,000 9.3%
Sea World, CA	4,000 0.1%	- -	1,000 0.1%	- -	- 0.4%	- -	- -	- -	- -	- -	1,000 0.2%	1,000 0.1%
San Jose	345,000 8.5%	57,000 8.7%	28,000 4.2%	25,000 10.5%	12,000 4.6%	16,000 8.9%	17,000 9.2%	28,000 15.2%	26,000 10.0%	2,000 1.9%	52,000 7.2%	62,000 6.6%
Anaheim-Santa Ana	328,000 8.1%	63,000 9.7%	53,000 8.1%	16,000 6.6%	31,000 12.2%	14,000 7.5%	8,000 4.3%	10,000 5.6%	21,000 8.2%	6,000 6.9%	48,000 6.6%	54,000 5.8%
Disneyland	73,000 1.8%	13,000 2.0%	15,000 2.3%	- 0.2%	8,000 3.2%	5,000 2.9%	- -	4,000 2.2%	2,000 0.9%	2,000 2.2%	14,000 1.9%	12,000 1.3%

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Table 4 (Continued)

METROPOLITAN STATISTICAL AREA*	TOTAL OVERSEAS	COUNTRY OF RESIDENCE OF VISITORS									FOURTH QUARTER 2001	FOURTH QUARTER 2002
		JAPAN	U.K.	GERMANY	AUSTRALIA/ NEW ZEALAND	SOUTH AMERICA	FRANCE	TAIWAN	SOUTH KOREA	ITALY		
ESTIMATED TRAVELERS (NUMBER OF RESPONDENTS)	4,053,000 (7,959)	653,000 (1,666)	660,000 (890)	236,000 (365)	256,000 (1,109)	185,000 (405)	190,000 (198)	184,000 (1,236)	256,000 (97)**	93,000 (103)	720,000 (1,407)	933,000 (1,895)
Knott's Berry Farm	4,000 0.1%	1,000 0.1%	- 0.2%	- -	- 0.3%	- -	- -	- 0.2%	- -	- -	- -	2,000 0.2%
Riverside-San Bernardino	154,000 3.8%	17,000 2.6%	52,000 7.9%	12,000 4.9%	5,000 1.8%	2,000 1.2%	13,000 7.1%	2,000 1.1%	- -	6,000 6.5%	27,000 3.8%	44,000 4.7%
Sacramento	134,000 3.3%	8,000 1.2%	17,000 2.5%	14,000 5.9%	10,000 3.9%	12,000 6.7%	5,000 2.6%	3,000 1.9%	6,000 2.2%	3,000 3.2%	29,000 4.0%	34,000 3.6%
Salinas-Seaside-Monterey	113,000 2.8%	10,000 1.6%	20,000 3.1%	13,000 5.4%	3,000 1.2%	16,000 8.6%	11,000 5.9%	2,000 1.1%	5,000 2.1%	4,000 4.7%	13,000 1.8%	18,000 1.9%
Oakland	105,000 2.6%	16,000 2.4%	11,000 1.7%	5,000 2.1%	6,000 2.2%	7,000 3.8%	5,000 2.7%	6,000 3.3%	5,000 1.9%	3,000 3.5%	19,000 2.7%	31,000 3.3%
Santa Barbara-Lompoc	105,000 2.6%	11,000 1.7%	17,000 2.6%	15,000 6.5%	9,000 3.5%	5,000 2.6%	10,000 5.1%	1,000 0.5%	- -	3,000 3.1%	15,000 2.1%	11,000 1.2%

*Visitors may report multiple destinations -- percentages are read down the column. Counties with less than 2% response were not listed.

Volume estimates by MSA were adjusted for non-response and will differ slightly from the estimates reported by ITA.

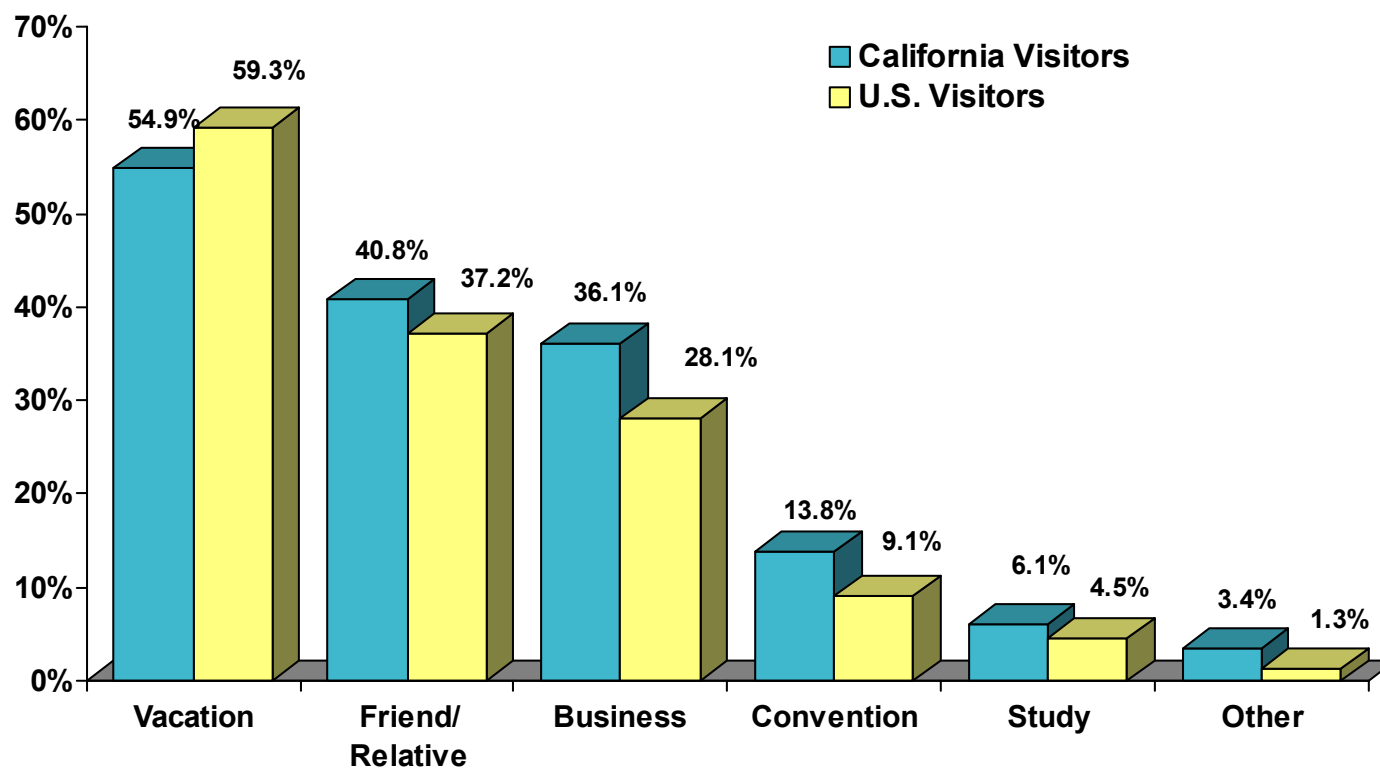
**Caution - Small sample size.

Source: ITA/OTTI Survey of International Air Travelers, 2002.

CIC Research, Inc.

PURPOSE OF U.S. TRIP

OVERSEAS VISITORS TO CALIFORNIA / U.S. (2002)



Source: ITA "In-Flight" Survey, 2002
CIC Research, Inc.

Table 5

**PURPOSE OF TRIP
OVERSEAS VISITORS TO CALIFORNIA
(2002)**

- More than half (55%) of all overseas visitors to California reported visiting for vacation/holiday purposes, while approximately four in ten were visiting friends/relatives (41%) or were on business (36%). Visitors to California attending a convention accounted for 14 percent.
- Visitors from the U.K., Italy, France and Germany indicated high proportions of vacationing during their U.S. trip.
- When compared with visitors from other countries, visitors to California from South America reported a high proportion of visiting for the purpose of attending a convention (25%). Similarly, a high proportion of visitors to California from South Korea, reported visiting for the purpose of studying (18% - caution, small sample size).
- A significantly higher proportion of visitors in the fourth quarter of 2002 (59%), than in the fourth quarter of 2001 (54%) were visiting California for the purpose of vacation/holidays. On the other hand, a significantly lower proportion of visitors in the fourth quarter 2002 (36%) than the fourth quarter 2001 (42%) mentioned they were visiting for business/professional reasons.

PURPOSE OF TRIP*	COUNTRY OF RESIDENCE OF VISITORS										FOURTH QUARTER 2001	FOURTH QUARTER 2002
	TOTAL OVERSEAS	JAPAN	U.K.	GERMANY	AUSTRALIA/ NEW ZEALAND	SOUTH AMERICA	FRANCE	TAIWAN	SOUTH KOREA	ITALY		
ESTIMATED TRAVELERS	4,053,000	653,000	660,000	236,000	256,000	185,000	190,000	184,000	256,000	93,000	720,000	933,000
(Number of Respondents)	(8,073)	(1,668)	(903)	(372)	(1,131)	(417)	(201)	(1,258)	(96)**	(103)	(1,436)	(1,926)
Vacation/Holidays	54.9%	49.4%	69.3%	63.3%	57.4%	48.0%	62.5%	49.9%	53.7%	64.8%	53.5%	58.6%
Visit Friends/Relatives	40.8	30.9	42.8	37.7	49.6	37.3	37.8	53.0	24.9	27.6	46.5	42.1
Business/Professional	36.1	40.8	27.1	34.5	38.0	43.4	29.3	42.3	30.5	25.7	41.9	36.4
Attend A Convention	13.8	12.8	7.3	16.1	15.9	24.5	10.5	16.4	17.7	13.9	12.4	11.1
Study/Teaching	6.1	7.0	2.9	4.1	5.2	8.1	2.5	7.1	18.0	11.0	8.0	6.9
Other	3.4	2.6	2.3	1.9	3.3	2.4	0.8	3.1	4.9	4.7	5.2	3.7

*Column percentages may total more than 100 percent due to multiple responses.

**Caution - Small sample size

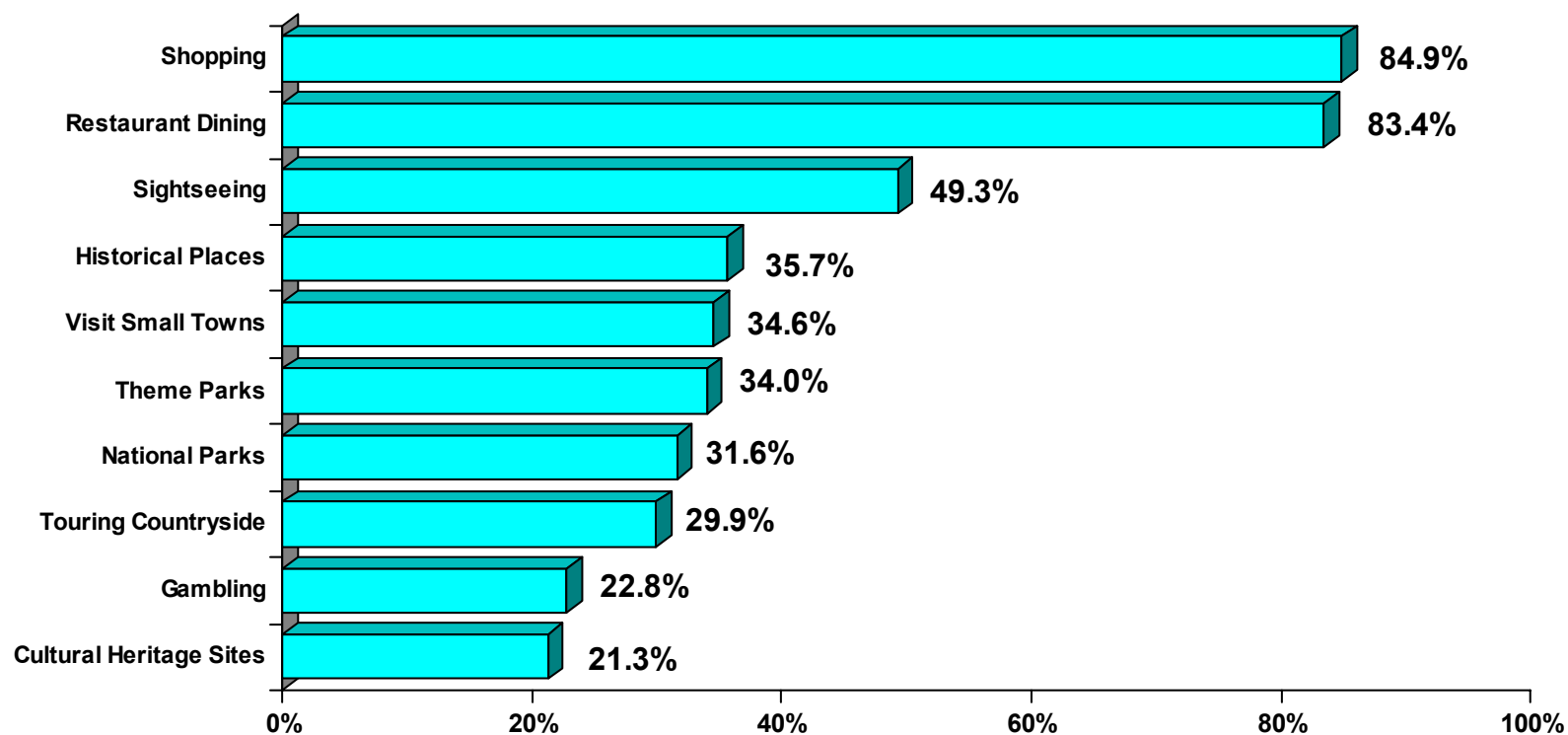
Source: ITA/OTTI Survey of International Air Travelers, 2002.

CIC Research, Inc.

LEISURE RECREATION ACTIVITIES

OVERSEAS VISITORS TO CALIFORNIA

(2002)



Source: ITA "In-Flight" Survey, 2002
CIC Research, Inc.

Table 6
**LEISURE-RECREATION ACTIVITIES
OVERSEAS VISITORS TO CALIFORNIA
(2002)**

- Shopping (85%), dining in restaurants (83%) followed by sightseeing (49%) were the most common leisure and recreation activities of overseas visitors to California.
- Similar to results from the previous year, visitors from the United Kingdom (94%) had the highest proportion of respondents who mentioned dining in restaurants. Visitors from France, the U.K. as well as from Australia/New Zealand, had the highest proportion of respondents who mentioned sightseeing in cities (60%, 58% and 55% each respectively).

LEISURE/RECREATION ACTIVITIES*	COUNTRY OF RESIDENCE OF VISITORS										FOURTH QUARTER 2001	FOURTH QUARTER 2002
	TOTAL OVERSEAS	JAPAN	U.K.	GERMANY	AUSTRALIA/ NEW ZEALAND	SOUTH AMERICA	FRANCE	TAIWAN	SOUTH KOREA	ITALY		
ESTIMATED TRAVELERS	4,053,000	653,000	660,000	236,000	256,000	185,000	190,000	184,000	256,000	93,000	720,000	933,000
(Number of Respondents)	(7,571)	(1,541)	(866)	(355)	(1,087)	(368)	(191)	(1,171)	(93)**	(97)**	(1,350)	(1,788)
Shopping	84.9%	84.9%	89.5%	79.5%	86.3%	80.2%	87.9%	90.2%	78.5%	74.4%	83.9%	89.0%
Dining in Restaurants	83.4	85.6	94.2	84.9	88.5	78.4	81.3	76.7	52.8	82.4	84.4	85.4
Sightseeing in Cities	49.3	45.9	57.6	40.1	54.9	39.0	59.6	52.2	51.9	51.2	46.7	50.4
Visit Historical Places	35.7	10.5	49.8	48.6	47.2	43.1	43.8	24.6	22.7	36.6	38.7	37.8
Visit Small Towns	34.6	28.9	37.7	38.1	38.3	41.1	29.1	19.2	36.6	41.3	35.6	31.6
Amusement/Theme Parks	34.0	28.5	35.1	30.5	38.5	33.6	35.5	37.7	39.8	27.9	31.8	34.7
Visit National Parks	31.6	16.1	36.0	50.3	27.8	22.6	45.7	24.8	40.9	47.3	27.4	31.3
Touring Countryside	29.9	12.6	36.9	54.1	35.2	20.2	21.8	13.8	31.2	25.2	32.4	28.1
Casinos/Gambling	22.8	16.3	24.7	23.2	17.0	15.7	28.9	28.2	37.8	23.5	21.9	24.9
Cultural Heritage Sites	21.3	10.4	28.4	38.9	25.2	15.2	30.2	15.5	23.1	17.9	24.4	19.7
Art Gallery/Museum	20.2	10.2	25.7	21.6	27.2	21.7	27.8	13.3	24.3	20.7	20.4	18.8
Guided Tours	16.8	12.6	25.1	17.5	24.4	10.7	7.9	24.8	19.0	10.3	12.5	19.6
Water Sports/Sunbathing	17.7	4.8	32.7	27.1	22.3	14.2	17.6	8.1	7.2	9.8	17.3	13.3
Nightclubs/Dancing	13.3	5.8	16.5	11.5	22.2	19.1	14.1	7.5	2.9	11.6	16.1	14.0
Concert/Play/Musical	12.6	7.9	15.6	15.7	17.9	13.8	13.6	8.4	9.0	5.9	14.1	12.4
Golfing/Tennis	7.7	11.1	6.9	4.7	5.1	6.3	5.2	8.2	6.0	6.1	10.0	7.8
Camping/Hiking	6.7	2.2	7.3	16.3	7.5	3.8	11.1	2.8	2.8	7.6	8.5	5.0
Attend Sports Event	6.5	4.8	10.1	9.6	13.5	6.5	3.5	2.8	0.1	4.2	11.2	
Cruises	5.5	6.0	4.5	3.7	8.5	2.3	1.2	6.8	9.0	4.3	4.2	7.4
Ethnic Heritage Sites	5.4	1.9	9.2	4.3	6.0	0.9	7.1	3.0	4.0	4.7	7.5	5.9
Environ./Eco. Excursions	4.7	3.4	5.8	4.3	4.4	3.5	11.5	7.1	0.8	11.7	4.2	4.4
Visit Am. Indian Comm.	4.4	2.4	6.4	10.9	3.9	4.1	6.7	2.5	0.5	14.5	4.4	3.8
Snow Skiing	3.0	0.5	2.0	2.3	7.7	3.7	2.8	2.5	1.3	1.2	4.2	3.0
Ranch Vacations	2.0	0.9	2.0	1.5	1.2	0.7	3.9	2.5	1.3	1.0	1.7	1.2
Hunting/Fishing	1.7	0.3	1.5	0.6	2.1	0.4	2.1	1.2	2.0	1.0	2.2	1.6

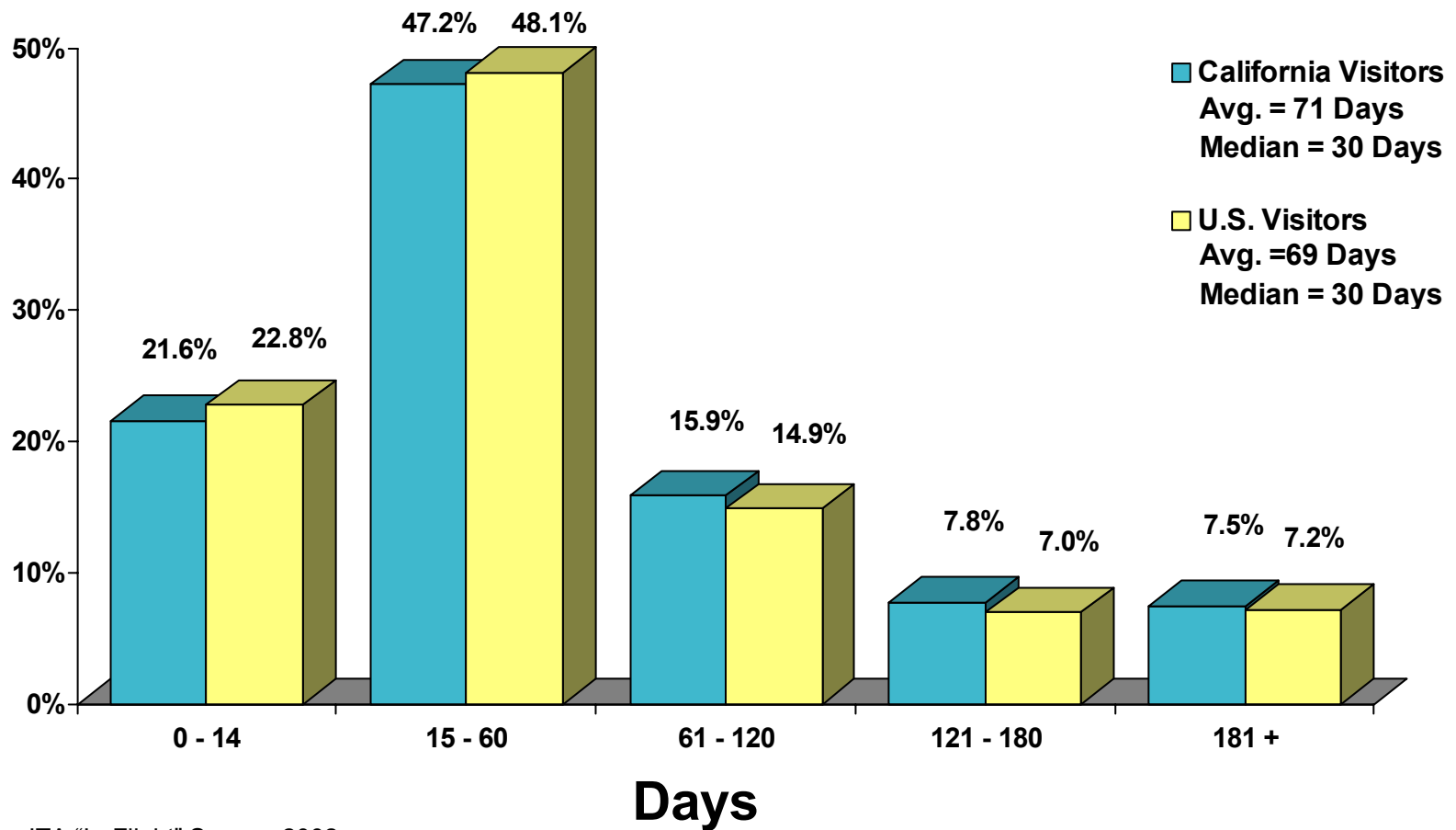
*Multiple response. Only responses 1.0 percent or greater are detailed.

**Caution - Small Sample Size

Source: ITA/OTTI Survey of International Air Travelers, 2002. CIC Research, Inc.

ADVANCE TRIP DECISION

OVERSEAS VISITORS TO CALIFORNIA / U.S. (2002)



Source: ITA "In-Flight" Survey, 2002
CIC Research, Inc.

Table 7

**ADVANCE TRIP DECISION
OVERSEAS VISITORS TO CALIFORNIA
(2002)**

- The median time period for overseas visitors' decision to travel was 30 days before the actual trip.
- Respondents from the U.K. had the longest planning time frame at a median of 90 days, and visitors from South Korea had the shortest planning time frame at a median of 22 days (caution-small sample size).
- The median time period for visitors' decision to travel prior to their actual trip, was longer during the fourth quarter 2002 (35 days), than during the fourth quarter 2001 (30 days).

ADVANCE TRIP DECISION*	COUNTRY OF RESIDENCE OF VISITORS										FOURTH QUARTER 2001	FOURTH QUARTER 2002
	TOTAL OVERSEAS	JAPAN	U.K.	GERMANY	AUSTRALIA/ NEW ZEALAND	SOUTH AMERICA	FRANCE	TAIWAN	SOUTH KOREA	ITALY		
ESTIMATED TRAVELERS	4,053,000	653,000	660,000	236,000	256,000	185,000	190,000	184,000	256,000	93,000	720,000	933,000
(Number of Respondents)	(7,761)	(1,622)	(869)	(364)	(1,101)	(405)	(193)	(1,202)	(86)**	(100)	(1,361)	(1,828)
14 Days or Less	21.6%	28.8%	14.6%	14.9%	16.0%	13.8%	15.9%	34.7%	28.3%	18.5%	28.6%	20.3%
15 - 60 Days	47.2	53.4	31.9	34.2	39.3	65.0	38.8	55.4	62.4	58.9	41.3	48.5
61 - 120 Days	15.9	13.3	23.2	22.6	19.0	13.8	21.4	6.7	5.3	9.0	13.9	17.2
121 - 180 Days	7.8	3.5	11.2	14.7	12.7	5.1	10.1	2.0	4.1	11.6	7.0	7.6
181 or More Days	7.5	1.0	19.1	13.5	12.9	2.3	13.7	1.3	-	2.0	9.0	6.6
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Average No. of Days	70.5	44.9	112.1	101.6	99.8	55.8	95.3	35.5	34.3	57.5	69.4	68.4
Median No. of Days	30.0	30.0	90.0	70.0	60.0	30.0	60.0	30.0	22.0	30.0	30.0	35.0

*Column percentages may not total 100 percent due to rounding.

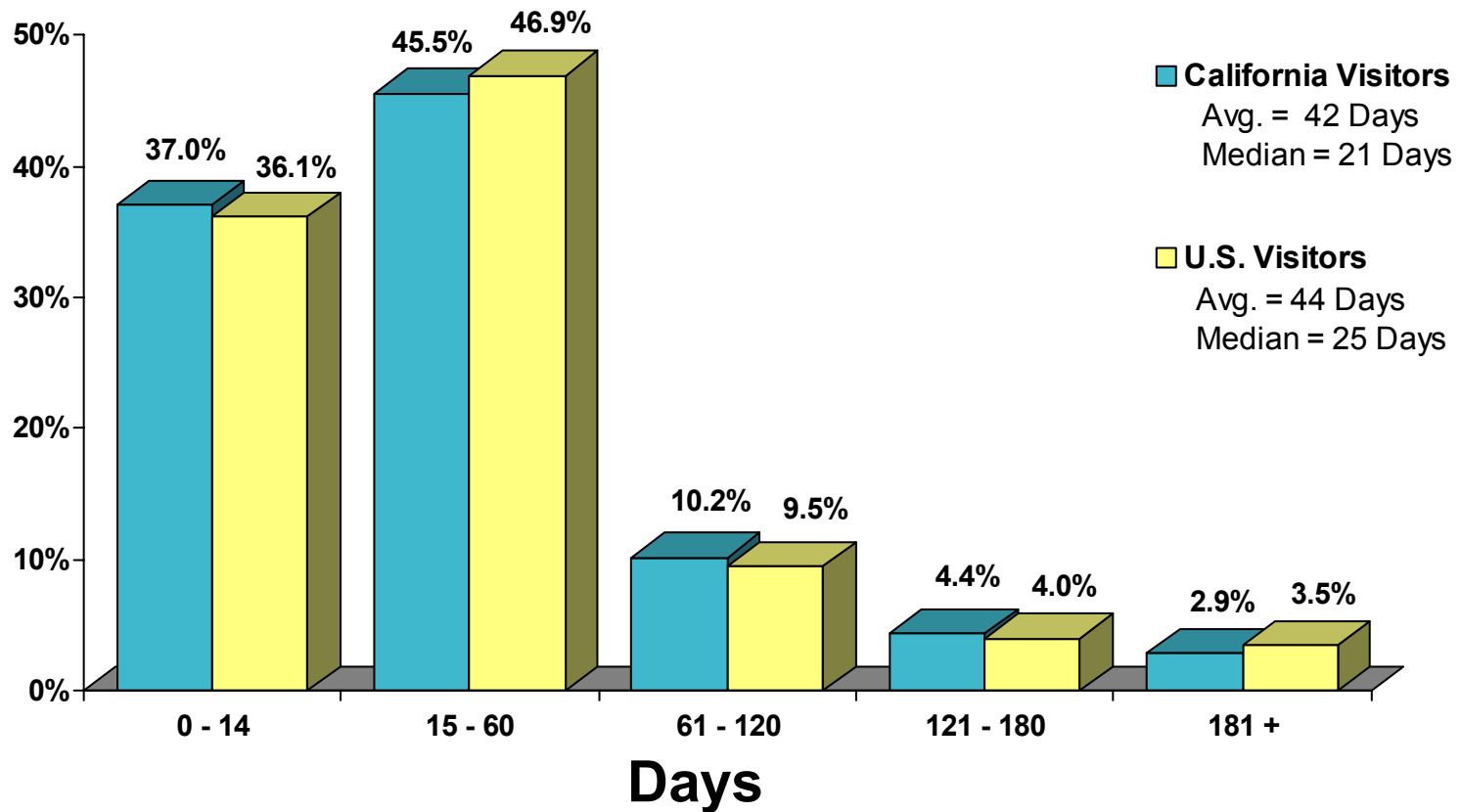
**Caution - Small sample size

Source: ITA/OTTI, Survey of International Air Travelers, 2002.

CIC Research, Inc.

ADVANCE AIRLINE DECISION

OVERSEAS VISITORS TO CALIFORNIA / U.S. (2002)



Source: ITA "In-Flight" Survey, 2002
CIC Research, Inc.

Table 8

**ADVANCE TICKET PURCHASE
OVERSEAS VISITORS TO CALIFORNIA
(2002)**

- An overseas visitor committed to an airline ticket purchase a median of 21 days prior to the actual trip.
- Visitors from the United Kingdom booked their airline tickets a median of 47 days or more in advance. By contrast, visitors from Taiwan and South Korea (caution- small sample size) only booked airline tickets a median of 10 days or less in advance.
- The median number of days for which visitors committed to an airline ticket purchase, was longer during the fourth quarter 2002 (25 days) than during the fourth quarter 2001 (20 days).

ADVANCE AIRLINE RESERVATIONS*	COUNTRY OF RESIDENCE OF VISITORS										FOURTH QUARTER 2001	FOURTH QUARTER 2002
	TOTAL OVERSEAS	JAPAN	U.K.	GERMANY	AUSTRALIA/ NEW ZEALAND	SOUTH AMERICA	FRANCE	TAIWAN	SOUTH KOREA	ITALY		
ESTIMATED TRAVELERS	4,053,000	653,000	660,000	236,000	256,000	185,000	190,000	184,000	256,000	93,000	720,000	933,000
(Number of Respondents)	(7,470)	(1,531)	(849)	(353)	(1,079)	(379)	(186)	(1,136)	(87)**	(98)**	(1,313)	(1,789)
14 Days or less	37.0%	44.9%	24.6%	24.7%	29.6%	26.8%	21.4%	57.9%	66.9%	32.3%	43.9%	36.1%
15 - 60 Days	45.5	49.1	35.9	44.6	45.2	63.1	48.0	39.0	32.6	53.1	37.5	45.3
61 - 120 Days	10.2	5.3	18.3	14.2	16.4	6.5	15.3	2.8	-	9.7	8.8	11.7
121 - 180 Days	4.4	0.4	10.8	13.4	5.4	2.4	7.5	0.1	-	4.8	6.0	4.1
181 or More Days	2.9	0.2	10.3	3.1	3.3	1.1	7.9	0.2	-	-	3.8	2.9
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Average No. of Days	42.3	26.7	78.0	63.3	53.7	34.7	63.6	18.0	12.9	36.8	43.5	42.8
Median No. of Days	21.0	20.0	47.0	35.0	30.0	20.0	30.0	10.0	7.0	20.0	20.0	25.0

*Column percentages may not total 100 percent due to rounding.

**Caution - Small sample size

Source: ITA/OTTI, Survey of International Air Travelers, 2002.

CIC Research, Inc.

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Table 9

**MEANS OF BOOKING AIR TRIP AND LODGING
OVERSEAS VISITORS TO CALIFORNIA
(2002)**

- Almost two thirds of overseas visitors to California used a travel agent to make airline reservations (64%). In comparison, one quarter (25%) of visitors used a travel agent to make lodging arrangements. Once again, visitors from South Korea reported the highest use of travel agents in booking their air trip (84% - caution, small sample size), while visitors from Australia/New Zealand reported the highest use of travel agents in booking their lodging (33%).

MEANS OF BOOKING AIR TRIP*	COUNTRY OF RESIDENCE OF VISITORS										FOURTH QUARTER 2001	FOURTH QUARTER 2002
	TOTAL OVERSEAS	JAPAN	U.K.	GERMANY	AUSTRALIA/ NEW ZEALAND	SOUTH AMERICA	FRANCE	TAIWAN	SOUTH KOREA	ITALY		
ESTIMATED TRAVELERS	4,053,000	653,000	660,000	236,000	256,000	185,000	190,000	184,000	256,000	93,000	720,000	933,000
(Number of Respondents)	(7,922)	(1,650)	(886)	(363)	(1,112)	(406)	(198)	(1,236)	(95)**	(101)	(1,404)	(1,893)
Travel Agent	63.5%	64.3%	52.7%	55.3%	72.2%	69.9%	51.0%	69.6%	84.0%	72.8%	62.8%	61.9%
Airline Directly	12.5	8.3	12.1	11.7	12.6	17.9	21.9	7.0	10.8	7.6	14.7	13.1
Company Travel Dept.	11.2	14.1	10.8	19.0	7.2	6.1	13.4	9.6	4.5	3.2	10.4	12.5
Personal Computer	5.7	5.5	11.5	6.4	3.2	2.0	6.7	3.5	0.4	5.0	4.8	5.2
Tour Operator	3.7	5.2	8.0	3.7	1.0	1.5	1.0	8.0	0.4	8.2	5.5	3.6
Travel Club	0.5	0.1	1.3	0.3	1.2	0.1	0.7	0.8	-	1.0	0.4	0.8
Don't Know/Other	2.9	2.6	3.5	3.6	2.5	2.5	5.2	1.4	-	2.2	1.3	2.9
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
MEANS OF BOOKING LODGING												
(Number of Respondents)	(7,912)	(1,607)	(890)	(366)	(1,119)	(403)	(199)	(1,246)	(95)**	(100)	(1,407)	(1,891)
Yes, Booked by**	61.4%	79.8%	65.7%	66.2%	61.6%	65.2%	48.7%	56.0%	41.1%	56.7%	58.7%	60.3%
Travel Agent	24.9%	28.5%	24.4%	22.3%	33.4%	30.3%	18.1%	29.1%	20.3%	23.4%	21.0%	23.2%
Company Travel Dept.	10.4	12.0	9.7	17.7	7.8	6.9	11.2	8.8	5.2	4.5	9.2	10.1
Hotel/Motel Directly	8.7	13.2	11.9	10.1	10.0	7.6	9.7	1.3	2.5	4.8	10.3	7.8
Business Associate	6.3	11.8	5.2	9.2	4.5	5.3	2.1	4.1	0.9	6.9	9.0	7.3
Friend or Relative	4.9	8.3	3.5	3.1	4.0	5.4	3.3	5.5	8.9	0.9	4.1	5.6
Tour Operator	3.3	4.2	6.7	3.0	0.8	2.9	2.8	4.4	1.7	6.4	4.7	3.1
Airline Staff	1.2	0.3	1.4	2.6	0.8	-	0.4	1.9	1.3	3.2	0.8	2.3
Other	8.2	10.6	9.9	7.0	9.3	11.6	3.1	4.8	8.2	8.8	8.2	8.8
No	38.6%	20.2%	34.3%	33.8%	38.4%	34.8%	51.3%	44.0%	58.9%	43.3%	41.3%	39.7%

*Column percentages may not total to 100 percent due to rounding.

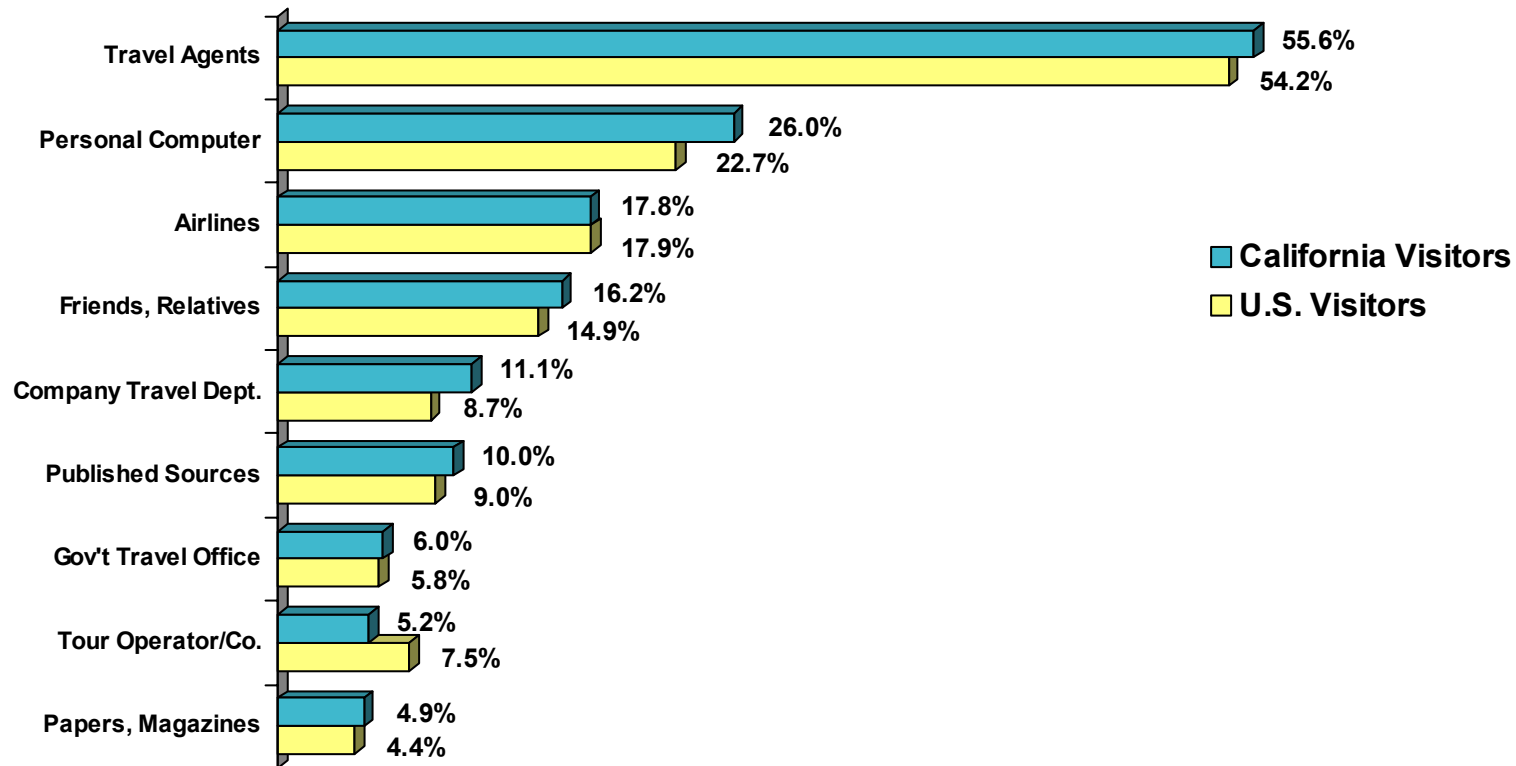
** Multiple Response. Percentages based on total number of respondents.

Source: ITA/OTTI, Survey of International Air Travelers, 2002

CIC Research, Inc.

TRAVEL INFORMATION SOURCES

OVERSEAS VISITORS TO CALIFORNIA / U.S. (2002)



Source: ITA "In-Flight" Survey, 2002
CIC Research, Inc.

Table 10

**U.S. TRIP INFORMATION SOURCES
OVERSEAS VISITORS TO CALIFORNIA
(2002)**

- Consistent with previous years, the majority of the overseas travelers to California (56%) used information from travel agencies to plan their trip. Personal computer was the next most frequently mentioned information source (26%), followed by those travelers who called the airlines directly (18%) and those who relied on friends/relatives (16%).
- Visitors from Australia/New Zealand (72%) and those from Italy (71%) showed the highest use of travel agencies as information sources. Consistent with results from previous years, visitors from Germany reported very high usage of published (16%) and government sources (28%) for travel information.
- Visitors to California during the fourth quarter 2002 tended to make significantly less use of a tour company, than visitors during the fourth quarter 2001 (5% versus 11% respectively).

INFORMATION SOURCES*	COUNTRY OF RESIDENCE OF VISITORS										FOURTH QUARTER 2001	FOURTH QUARTER 2002
	TOTAL OVERSEAS	JAPAN	U.K.	GERMANY	AUSTRALIA/ NEW ZEALAND	SOUTH AMERICA	FRANCE	TAIWAN	SOUTH KOREA	ITALY		
ESTIMATED TRAVELERS	4,053,000	653,000	660,000	236,000	256,000	185,000	190,000	184,000	256,000	93,000	720,000	933,000
(Number of Respondents)	(8,008)	(1,653)	(897)	(369)	(1,118)	(413)	(201)	(1,245)	(96)**	(102)	(1,423)	(1,908)
Travel Agency	55.6%	56.9%	49.7%	38.8%	72.4%	58.3%	52.0%	57.3%	56.3%	71.0%	57.1%	55.1%
Personal Computer	26.0	30.5	29.8	32.4	23.4	15.5	25.3	19.0	26.8	26.9	27.3	25.7
Airlines Directly	17.8	14.4	17.6	18.3	19.6	24.5	22.5	15.7	15.7	15.6	18.6	17.6
Friends/Relatives	16.2	15.6	16.9	19.2	18.9	12.2	18.8	16.2	6.9	13.6	17.4	17.9
Corporate Travel Dept.	11.1	15.7	11.0	18.2	8.3	6.4	12.1	8.6	6.2	3.2	12.0	12.3
Travel Guides	10.0	15.9	9.4	15.7	8.8	5.8	12.7	6.0	15.0	10.2	9.9	8.1
Government Sources	6.0	2.2	2.4	28.3	4.5	9.4	4.5	2.4	8.2	3.8	5.2	4.2
Tour Company	5.2	8.3	8.9	6.2	1.7	4.8	2.4	9.3	3.4	1.7	10.9	5.1
Newspapers/Magazines	4.9	4.8	4.2	3.9	3.4	4.1	1.5	3.4	10.9	2.1	5.5	6.4
TV/Radio	1.2	2.4	1.8	1.9	1.6	-	0.2	0.4	-	-	3.0	0.8
In-flight Info. Systems	0.8	0.6	0.7	1.2	0.3	1.7	0.5	0.8	-	1.9	2.2	1.7

*Column percentages may total more than 100 percent due to multiple responses.

**Caution - Small sample size

Source: ITA/OTTI, Survey of International Air Travelers, 2002.

CIC Research, Inc.

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Table 11

**AIRLINE TICKET CLASS AND PREPAID TRIP PACKAGE
OVERSEAS VISITORS TO CALIFORNIA
(2002)**

- More than two-thirds (68%) of overseas visitors to California used an economy/tourist ticket, while 20 percent used a business class ticket. Visitors from South America and Italy tended to make the greatest use of the economy ticket (77% and 76% each respectively).
- Twelve percent (12%) of overseas travelers to California traveled with an inclusive tour package, where airfare, lodging, ground transportation or other items were prepaid prior to departure. Visitors from the U.K. (18%), France (16%) and Australia/New Zealand (15%) took the greatest advantage of inclusive tour packages. On the other hand, fewer visitors from Germany (9%), South America (10%) and Italy (10% - caution, small sample size) used tour packages.

TYPE OF AIRLINE TICKET*	COUNTRY OF RESIDENCE OF VISITORS										FOURTH QUARTER 2001	FOURTH QUARTER 2002
	TOTAL OVERSEAS	JAPAN	U.K.	GERMANY	NEW ZEALAND	SOUTH AMERICA	FRANCE	TAIWAN	SOUTH KOREA	ITALY		
ESTIMATED TRAVELERS	4,053,000	653,000	660,000	236,000	256,000	185,000	190,000	184,000	256,000	93,000	720,000	933,000
(Number of Respondents)	(7,797)	(1,611)	(883)	(362)	(1,110)	(390)	(196)	(1,201)	(93)**	(99)**	(1,396)	(1,851)
Economy/Tourist/Coach	67.9%	54.0%	71.5%	67.7%	67.1%	76.7%	69.6%	64.3%	83.8%	76.1%	66.9%	65.7%
Executive/Business	19.5	30.9	13.8	24.6	15.0	8.3	20.6	23.6	12.2	20.0	20.8	20.5
Frequent Flyer Upgrade	4.4	5.4	3.9	7.7	7.9	5.1	3.4	5.8	0.8	0.5	6.3	3.5
Frequent Flyer Award	3.6	2.1	2.7	3.8	7.4	9.9	5.9	1.7	-	2.2	3.4	4.8
First Class	3.1	3.6	5.1	0.6	2.8	1.5	1.4	1.6	1.8	2.7	2.8	2.6
Discount/Group Fare	2.7	6.6	1.4	1.9	2.6	0.5	6.9	5.8	1.6	-	3.5	3.0
Non-Revenue	1.5	1.3	1.9	1.8	2.1	1.8	-	0.4	-	-	1.4	1.4
Don't Know	3.1	4.9	4.1	2.3	3.2	2.6	1.6	1.4	-	-	2.3	3.0
USE OF PREPAID PACKAGE												
(Number of Respondents)	(7,914)	(1,648)	(899)	(367)	(1,119)	(399)	(197)	(1,229)	(94)**	(101)	(1,411)	(1,882)
YES**	11.9%	12.4%	17.9%	8.7%	15.0%	9.6%	15.8%	12.6%	12.7%	9.5%	8.8%	12.0%
Air/Lodging	8.6	10.7	13.2	7.0	11.9	5.2	10.5	7.5	7.1	3.6	5.2	8.7
Guided Tour	5.0	5.3	6.3	3.9	5.2	2.6	7.9	5.8	10.3	6.1	3.4	5.9
Air/Rent Car	4.1	0.4	6.8	3.7	6.5	1.7	6.7	3.8	4.8	1.6	3.8	4.3
Air/Lodging/Tour	3.3	4.1	3.8	3.4	4.3	0.4	5.0	3.5	7.1	1.8	1.4	4.3
Air/Lodging/Rent Car	3.0	0.1	5.2	2.9	5.3	1.4	3.9	2.3	4.8	-	2.6	3.8
Air/Lodging/Bus	2.7	3.2	4.1	3.6	5.5	0.1	5.4	3.4	2.0	1.8	0.9	3.0
Air/Lodging/Bus/Tour	1.7	1.6	1.6	3.2	2.7	0.1	5.0	3.1	2.0	1.8	0.6	1.6
Cruise	0.6	0.6	0.9	0.2	1.6	0.3	0.3	2.0	0.5	1.8	0.8	0.7
NO	88.1%	87.6%	82.1%	91.3%	85.0%	90.4%	84.2%	87.4%	87.3%	90.5%	91.2%	88.0%
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

*Column percentages may not total 100 percent due to multiple response.

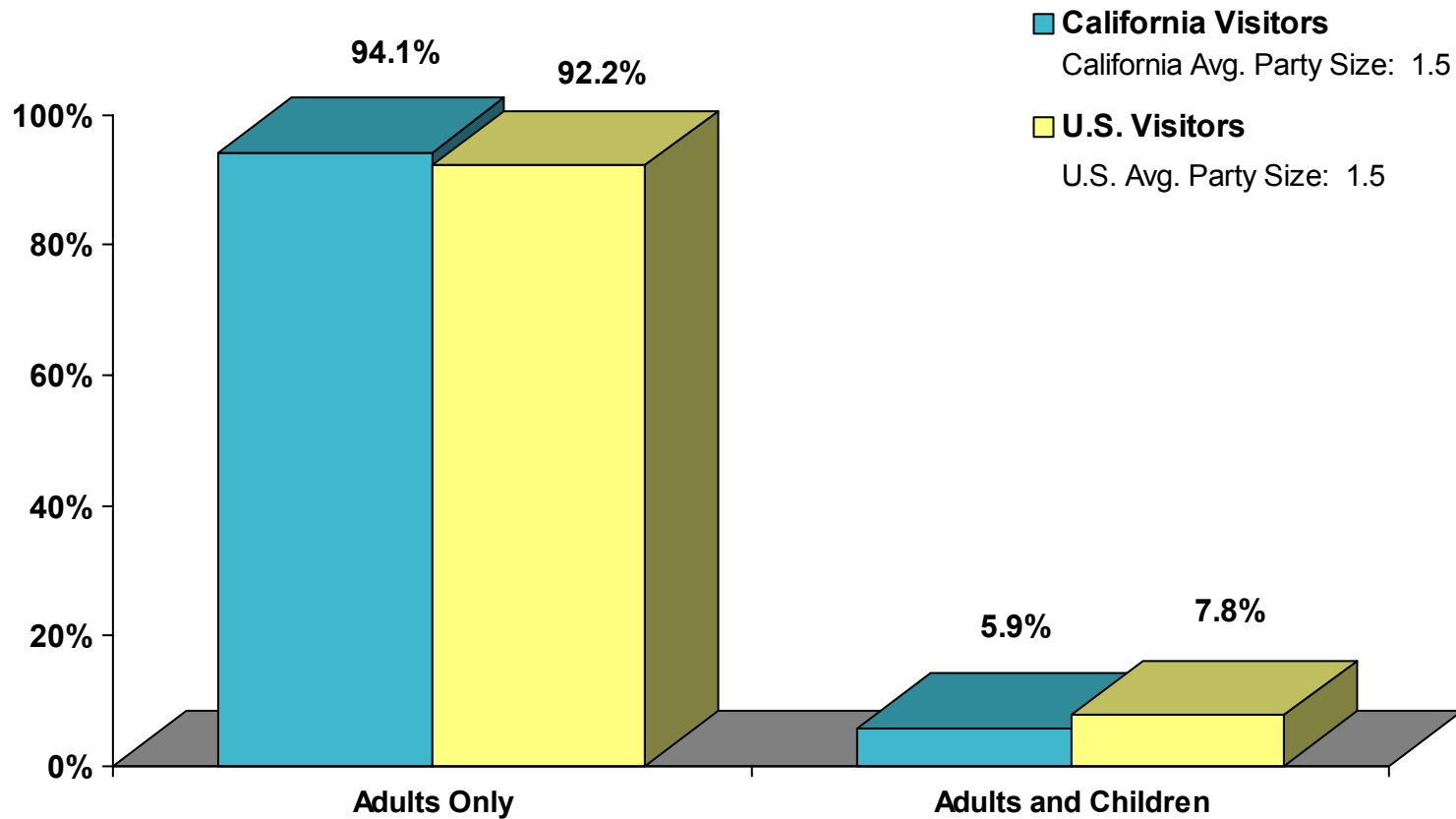
**Multiple response. Includes all package combinations. Each category not mutually exclusive.

Source: ITA/OTTI, Survey of International Air Travelers, 2002.

CIC Research, Inc.

TRAVEL PARTY SIZE

OVERSEAS VISITORS TO CALIFORNIA / U.S. (2002)



Source: ITA "In-Flight" Survey, 2002
CIC Research, Inc.

Table 12

**TRAVEL PARTY SIZE
OVERSEAS VISITORS TO CALIFORNIA
(2002)**

- The mean total party size for all overseas travelers was 1.5 persons. Overall, 94 percent of overseas travelers were adults only, and six percent were adults traveling with children. The greatest proportion of visitors, who reported traveling with children, was from Italy (9%) , followed by Taiwan (8%) , France (8%), the U.K. and Australia/New Zealand (7% each).
- The proportion of adults traveling with children increased from 3.7 percent in the fourth quarter 2001 to 4.7 percent in the fourth quarter 2002.

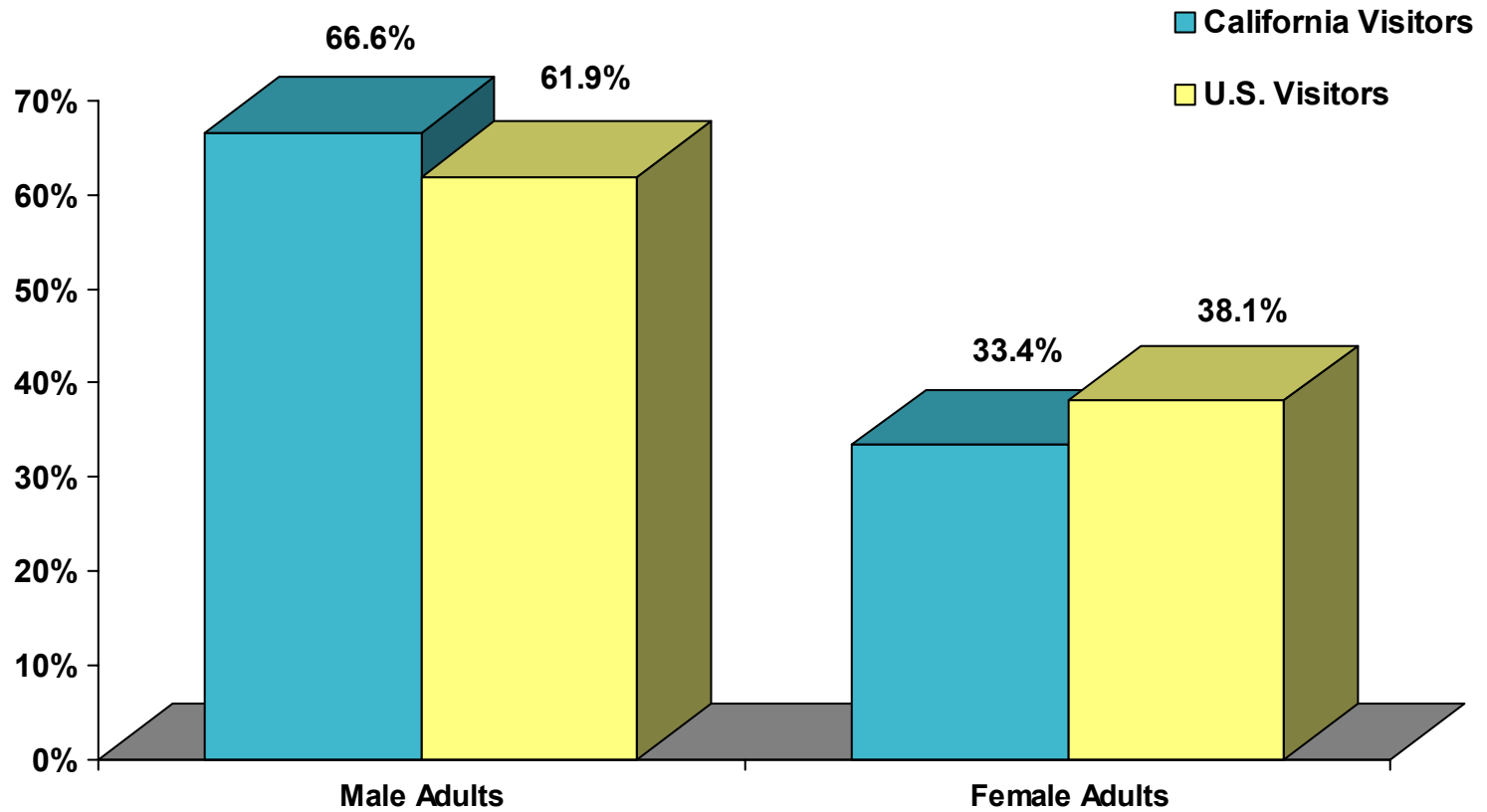
TRAVEL PARTY SIZE	COUNTRY OF RESIDENCE OF VISITORS										FOURTH QUARTER 2001	FOURTH QUARTER 2002
	TOTAL OVERSEAS	JAPAN	U.K.	GERMANY	AUSTRALIA/ NEW ZEALAND	SOUTH AMERICA	FRANCE	TAIWAN	SOUTH KOREA	ITALY		
ESTIMATED TRAVELERS	4,053,000	653,000	660,000	236,000	256,000	185,000	190,000	184,000	256,000	93,000	720,000	933,000
(Number of Respondents)	(8,071)	(1,675)	(903)	(370)	(1,131)	(413)	(200)	(1,259)	(96)**	(103)	(1,438)	(1,925)
Adults Only	94.1%	96.3%	92.6%	94.7%	93.1%	95.7%	92.3%	92.2%	93.7%	91.4%	96.3%	95.3%
Adults and Children	5.9	3.7	7.4	5.3	6.9	4.3	7.7	7.8	6.3	8.6	3.7	4.7
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Average Total Party Size	1.5	1.5	1.6	1.4	1.4	1.3	1.6	1.5	1.3	1.6	1.4	1.4
Median Total Party Size	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0
ADULTS ONLY												
(Number of Respondents)	(7,365)	(1,601)	(806)	(342)	(1,031)	(382)	(174)	(1,112)	(81)**	(91)**	(1,345)	(1,801)
Average Adult Party Size	1.3	1.4	1.4	1.3	1.3	1.2	1.5	1.3	1.2	1.4	1.3	1.3
Median Adult Party Size	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0
ADULTS AND CHILDREN												
(Number of Respondents)	(706)	(74)**	(97)**	(28)**	(100)	(31)**	(26)**	(147)	(15)**	(12)**	(93)**	(124)
Average Party Size	3.5	3.4	4.0	3.0	3.5	3.2	3.5	3.3	3.4	3.6	3.3	3.5
Median Party Size	3.0	3.0	3.0	3.0	3.0	3.0	3.0	3.0	3.0	3.0	3.0	3.0

**Caution - Small sample size.

Source: ITA/OTTI Survey of International Air Travelers, 2002.
CIC Research, Inc.

GENDER OF OVERSEAS VISITORS

OVERSEAS VISITORS TO CALIFORNIA / U.S. (2002)



Source: ITA "In-Flight" Survey, 2002
CIC Research, Inc.

Table 13

**SEX AND AGE
OVERSEAS VISITORS TO CALIFORNIA
(2002)**

- Two-thirds (67%) of all travelers to California were adult males, and one third (33%) were adult females. The average age of traveling adult males was 43 years old, versus 39 years for traveling adult females.
- The proportion of adult male travelers to California was significantly lower in the fourth quarter 2002 (63%), than in the fourth quarter 2001 (70%). On the other hand the proportion of adult female travelers, was significantly higher in the fourth quarter 2002 (38%), than in the fourth quarter 2001 (30%).

SEX AND AGE OF VISITOR*	COUNTRY OF RESIDENCE OF VISITORS										FOURTH QUARTER 2001	FOURTH QUARTER 2002
	TOTAL OVERSEAS	JAPAN	U.K.	GERMANY	AUSTRALIA/ NEW ZEALAND	SOUTH AMERICA	FRANCE	TAIWAN	SOUTH KOREA	ITALY		
ESTIMATED TRAVELERS (Number of Respondents)	4,053,000 (7,594)	653,000 (1,566)	660,000 (867)	236,000 (342)	256,000 (1,078)	185,000 (377)	190,000 (187)	184,000 (1,161)	256,000 (90)**	93,000 (101)	720,000 (1,359)	933,000 (1,813)
MALE ADULTS	66.6%	71.6%	60.4%	71.3%	55.2%	71.5%	64.9%	62.3%	71.0%	70.6%	69.6%	62.5%
18-24 Years	2.8	3.0	2.3	3.8	5.9	3.4	2.9	1.2	2.8	3.4	3.8	2.7
25 - 34 Years	17.0	13.5	13.5	16.5	7.7	15.3	12.1	17.0	44.0	15.8	19.0	14.5
35 - 54 Years	35.1	41.2	28.9	38.3	28.5	42.8	35.0	38.1	22.4	43.6	33.4	34.0
55 + Years	11.6	14.0	15.7	12.7	13.2	10.0	15.0	6.0	1.9	7.8	13.5	11.4
Average Male Age	42.5	44.0	44.8	42.7	44.1	41.8	44.8	41.2	34.1	41.3	41.9	43.1
Median Male Age	42.0	44.0	43.0	41.0	43.0	41.0	46.0	40.0	30.0	41.0	40.0	42.0
FEMALE ADULTS	33.4%	28.4%	39.6%	28.7%	44.8%	28.5%	35.1%	37.7%	29.0%	29.4%	30.4%	37.5%
18-24 Years	4.5	4.3	5.9	4.9	7.9	2.1	7.6	4.0	0.8	1.3	3.2	5.4
25 - 34 Years	10.4	8.7	9.9	6.0	8.2	9.2	14.4	12.5	14.6	15.0	9.9	12.3
35 - 54 Years	13.5	10.2	16.7	13.7	20.1	12.6	8.0	19.4	13.4	9.0	12.6	14.5
55 + Years	4.8	5.1	7.3	4.0	8.4	4.7	5.1	1.7	0.1	4.3	4.7	5.4
Average Female Age	39.1	39.2	40.6	39.7	41.0	40.4	36.3	36.5	36.2	38.1	39.9	39.1
Median Female Age	37.0	37.0	40.0	38.0	40.0	41.0	32.0	36.0	32.0	34.0	38.0	37.0

*Column percentages may not total to 100 percent due to rounding.

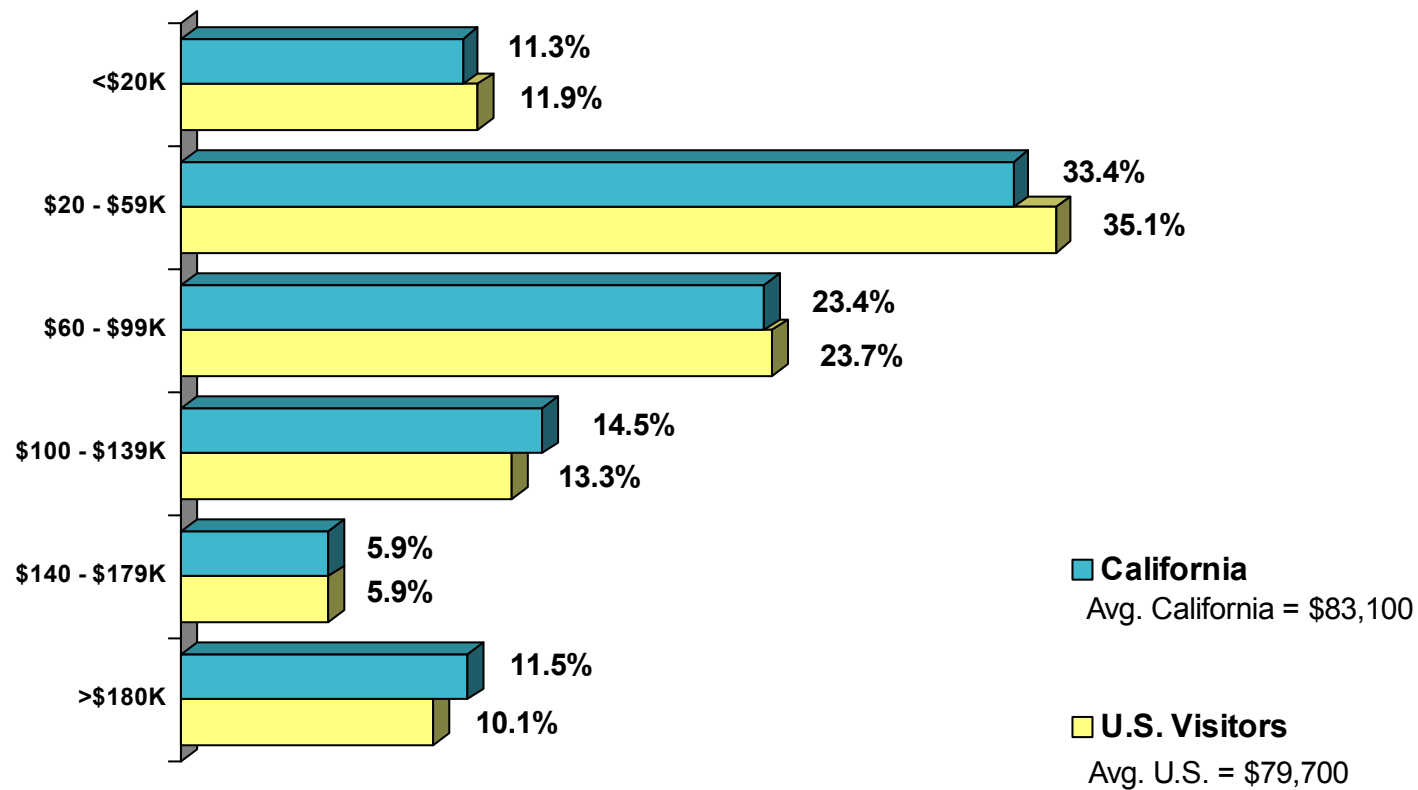
**Caution - Small sample size

Source: ITA/OTTI Survey of International Air Travelers, 2002.

CIC Research, Inc.

INCOME PROFILE OF OVERSEAS VISITORS

OVERSEAS VISITORS TO CALIFORNIA / U.S. (2002)



Source: ITA "In-Flight" Survey, 2002
CIC Research, Inc.

Table 14

**ANNUAL HOUSEHOLD INCOME
OVERSEAS VISITORS TO CALIFORNIA
(2002)**

- The mean household income for overseas visitors to California was \$83,100 up slightly from \$81,700 in 2001. During 2002, visitors from the U.K. (\$95,800) followed by visitors from Japan (\$91,900) reported the highest annual average income. Visitors from South America reported the lowest annual household income at \$60,700.
- It is evident that the mean household income for overseas visitors during the fourth quarter 2002 (\$82,500) was higher than during the fourth quarter 2001 (\$78,400).

ANNUAL HOUSEHOLD INCOME*	COUNTRY OF RESIDENCE OF VISITORS										FOURTH QUARTER 2001	FOURTH QUARTER 2002
	TOTAL OVERSEAS	JAPAN	U.K.	GERMANY	AUSTRALIA/ NEW ZEALAND	SOUTH AMERICA	FRANCE	TAIWAN	SOUTH KOREA	ITALY		
ESTIMATED TRAVELERS	4,053,000	653,000	660,000	236,000	256,000	185,000	190,000	184,000	256,000	93,000	720,000	933,000
(NUMBER OF RESPONDENTS)	(6,857)	(1,352)	(765)	(298)	(987)	(356)	(160)	(1,095)	(82)**	(79)**	(1,255)	(1,648)
Under \$20,000	11.3%	4.7%	5.3%	5.8%	11.8%	21.0%	11.7%	9.0%	22.2%	7.2%	12.8%	9.4%
\$20,000 - \$59,999	33.4	28.2	29.6	32.7	41.9	40.6	33.1	42.7	38.5	40.9	39.5	33.5
\$60,000 - \$99,999	23.4	29.4	28.6	23.6	23.2	19.6	28.4	23.4	14.5	24.1	19.2	25.3
\$100,000 - \$139,999	14.5	20.4	13.3	17.2	9.5	11.5	11.8	13.6	14.1	11.1	10.3	16.6
\$140,000 - \$179,999	5.9	7.8	6.3	8.5	4.3	2.5	4.9	3.5	2.5	5.1	5.0	6.1
\$180,000 and over	11.5	9.5	17.1	12.2	9.2	4.8	10.1	7.7	8.2	11.6	13.0	9.0
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Average Annual Income	\$83,100	\$91,900	\$95,800	\$90,200	\$73,000	\$60,700	\$78,500	\$73,000	\$67,500	\$81,300	\$78,400	\$82,500
Median Annual Income	\$68,400	\$84,500	\$78,700	\$76,000	\$56,400	\$47,400	\$65,600	\$58,300	\$48,200	\$62,200	\$57,200	\$70,800

*Column percentages may not total to 100 percent due to rounding.

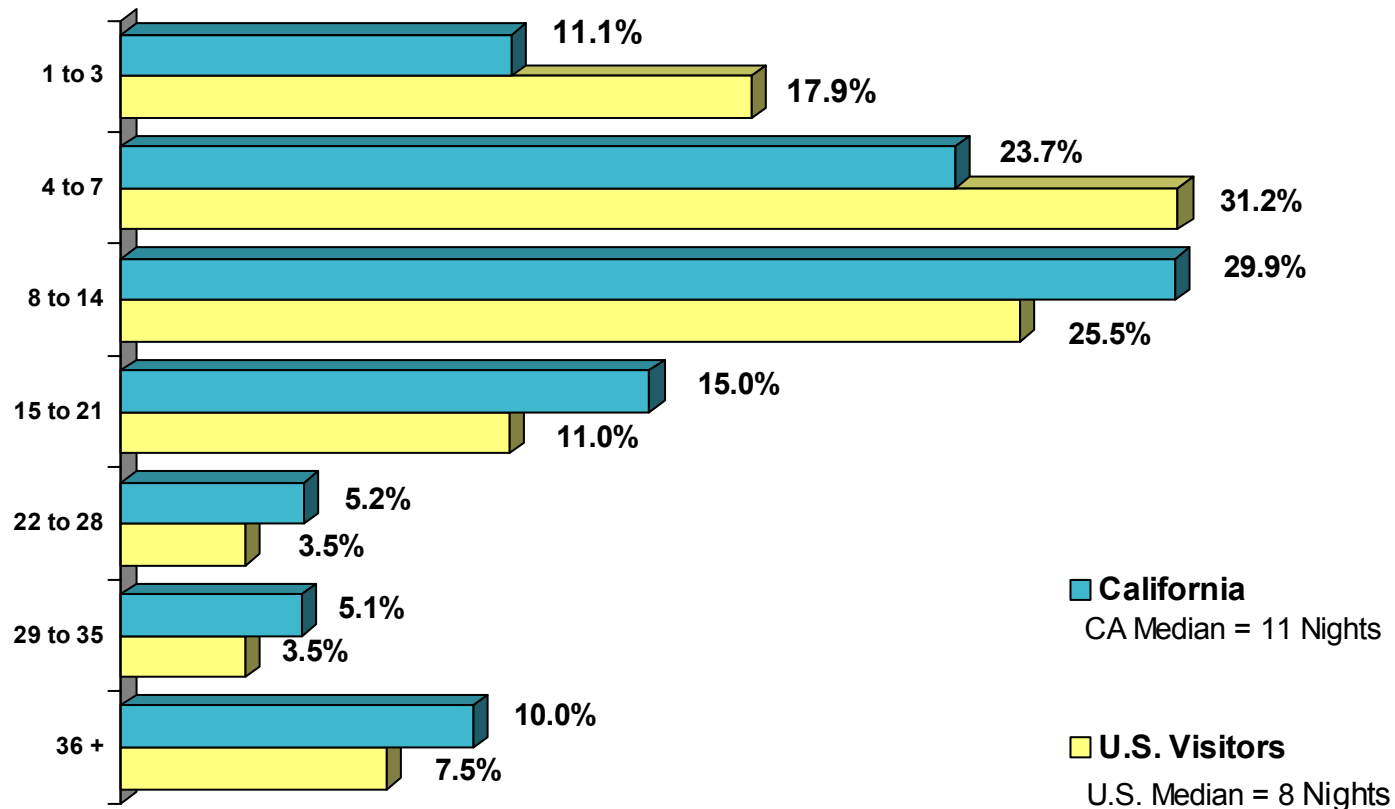
**Caution-Small sample size

Source: ITA/OTTI Survey of International Air Travelers, 2002.
CIC Research, Inc.

TOTAL NIGHTS IN THE U.S.

OVERSEAS VISITORS TO CALIFORNIA / U.S.

(2002)



Source: ITA "In-Flight" Survey, 2002
CIC Research, Inc.

Table 15

**NIGHTS AWAY FROM HOME
OVERSEAS VISITORS TO CALIFORNIA
(2002)**

- Overseas visitors to California stayed an average of 21 nights in the U.S. and 10 nights in California. Nationalities varied in their average length of U.S. trip. Visitors from Japan and Italy spent the least amount of time in the U.S. (12 and 14 nights each respectively), while visitors from Japan and the U.K. spent the least amount of time in California (8 nights each respectively).
- The longest average stay in the U.S. by travelers to California was reported by visitors from South Korea (42 nights) followed by visitors from Australia/New Zealand (24 nights). The longest average stay in California was reported by visitors from Taiwan and South America (14 and 13 nights each respectively).
- There was a decrease in the average length of stay in the U.S. as well as California from the fourth quarter 2001 to the fourth quarter 2002 (23 nights versus 19 nights each respectively in the U.S., and 12 nights versus 9 nights each respectively in California).

NIGHTS IN U.S.	COUNTRY OF RESIDENCE OF VISITORS										FOURTH QUARTER 2001	FOURTH QUARTER 2002
	TOTAL OVERSEAS	JAPAN	U.K.	GERMANY	AUSTRALIA/ NEW ZEALAND	SOUTH AMERICA	FRANCE	TAIWAN	SOUTH KOREA	ITALY		
ESTIMATED TRAVELERS	4,053,000	653,000	660,000	236,000	256,000	185,000	190,000	184,000	256,000	93,000	720,000	933,000
(Number of Respondents)	(8,060)	(1,673)	(903)	(372)	(1,131)	(414)	(200)	(1,252)	(96)**	(102)	(1,431)	(1,925)
Average No. Nights	20.6	12.3	16.3	20.8	23.8	19.6	16.6	19.0	41.8	13.9	23.1	18.5
Median No. Nights	11.0	6.0	12.0	14.0	14.0	10.0	13.0	10.0	14.0	10.0	12.0	10.0
NIGHTS IN CALIFORNIA												
(Number of Respondents)	(7,185)	(1,550)	(830)	(330)	(1,039)	(369)	(183)	(1,043)	(81)**	(97)**	(1,244)	(1,713)
Average Nts. in Dest.	9.7	7.9	7.9	10.7	10.1	12.9	8.5	13.6	9.2	9.5	11.6	9.2
Median Nts. in Dest.	5.0	4.0	5.0	7.0	5.0	7.0	6.0	6.0	4.0	7.0	5.0	5.0

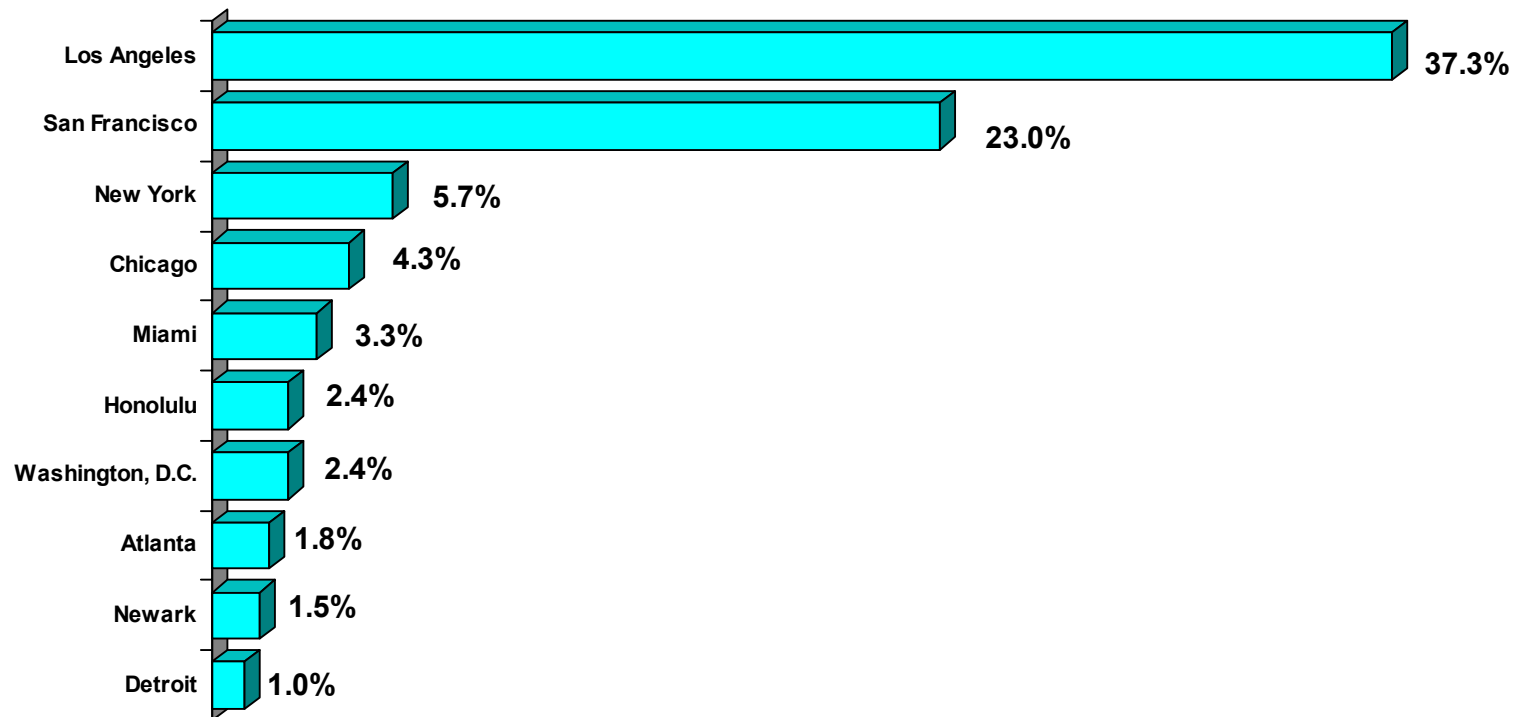
*Caution - Small sample size

Source: ITA/OTTI Survey of International Air Travelers, 2002.
CIC Research, Inc.

PORT OF ENTRY OF OVERSEAS VISITORS

OVERSEAS VISITORS TO CALIFORNIA

(2002)



Source: ITA "In-Flight" Survey, 2002
CIC Research, Inc.

Table 16

**PORT OF ENTRY
OVERSEAS VISITORS TO CALIFORNIA
(2002)**

- A high ratio of California ports of entry is expected for overseas visitors to the State. Consistent with results in previous years, six in ten (60%) of these visitors reported U.S. entry either through Los Angeles or San Francisco.

PORT OF ENTRY*	COUNTRY OF RESIDENCE OF VISITORS										FOURTH QUARTER 2001	FOURTH QUARTER 2002
	TOTAL OVERSEAS	JAPAN	U.K.	GERMANY	AUSTRALIA/ NEW ZEALAND	SOUTH AMERICA	FRANCE	TAIWAN	SOUTH KOREA	ITALY		
ESTIMATED TRAVELERS	4,053,000	653,000	660,000	236,000	256,000	185,000	190,000	184,000	256,000	93,000	720,000	933,000
(Number of Respondents)	(8,089)	(1,675)	(903)	(372)	(1,131)	(417)	(201)	(1,261)	(97)**	(103)	(1,440)	(1,929)
Atlanta, GA	1.8%	-	2.2%	3.9%	0.2%	7.3%	7.5%	-	-	3.9%	2.1%	1.6%
Boston, MA	0.4	-	0.9	0.7	0.4	-	0.6	-	-	-	0.2	0.1
Chicago, IL	4.3	2.0%	8.4	7.3	1.3	1.9	4.0	0.3%	-	3.5	4.4	3.4
Dallas/Ft. Worth, TX	0.9	0.5	0.5	0.7	0.6	8.7	0.3	-	-	-	0.9	0.8
Detroit, MI	1.0	3.7	0.4	0.6	-	-	-	3.0	-	-	1.3	1.7
Honolulu, HI	2.4	6.0	0.3	0.2	5.8	-	0.1	0.8	8.6%	-	0.8	4.0
Houston, TX	0.8	0.5	0.3	0.4	0.1	4.3	0.9	-	-	-	0.1	1.0
Los Angeles, CA	37.3	47.3	32.8	28.2	73.3	21.5	28.4	49.5	45.3	25.6	41.3	37.0
Miami, FL	3.3	0.1	1.1	0.8	0.5	48.2	1.2	0.2	0.1	1.8	4.4	4.8
Minn./St. Paul, MN	0.4	0.3	2.2	-	-	-	-	-	-	-	0.3	1.1
New York, NY	5.7	1.8	7.0	3.0	1.8	2.5	7.1	2.5	8.0	24.1	7.0	5.0
Newark, NJ	1.5	2.3	1.7	1.2	0.3	0.2	1.0	0.1	-	4.7	0.1	1.3
Orlando, FL	0.7	-	3.9	-	0.1	-	-	-	-	-	0.1	0.2
Philadelphia, PA	0.2	-	0.2	0.9	-	-	1.1	-	-	-	-	0.1
Portland, OR	-	-	-	-	-	-	-	-	-	-	-	-
San Francisco, CA	23.0	27.9	26.0	31.4	8.6	0.6	28.8	32.8	27.3	18.0	23.9	20.7
Seattle, WA	1.0	1.5	0.7	2.2	0.1	-	0.6	1.7	1.6	-	0.4	0.5
Washington, DC	2.4	1.1	2.6	6.8	1.0	0.3	2.2	-	1.6	4.4	1.8	2.2
Other	12.7	4.9	8.7	11.6	6.0	4.4	16.1	8.8	7.5	14.0	11.0	14.4
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

*Column percentages may not total to 100 percent due to rounding.

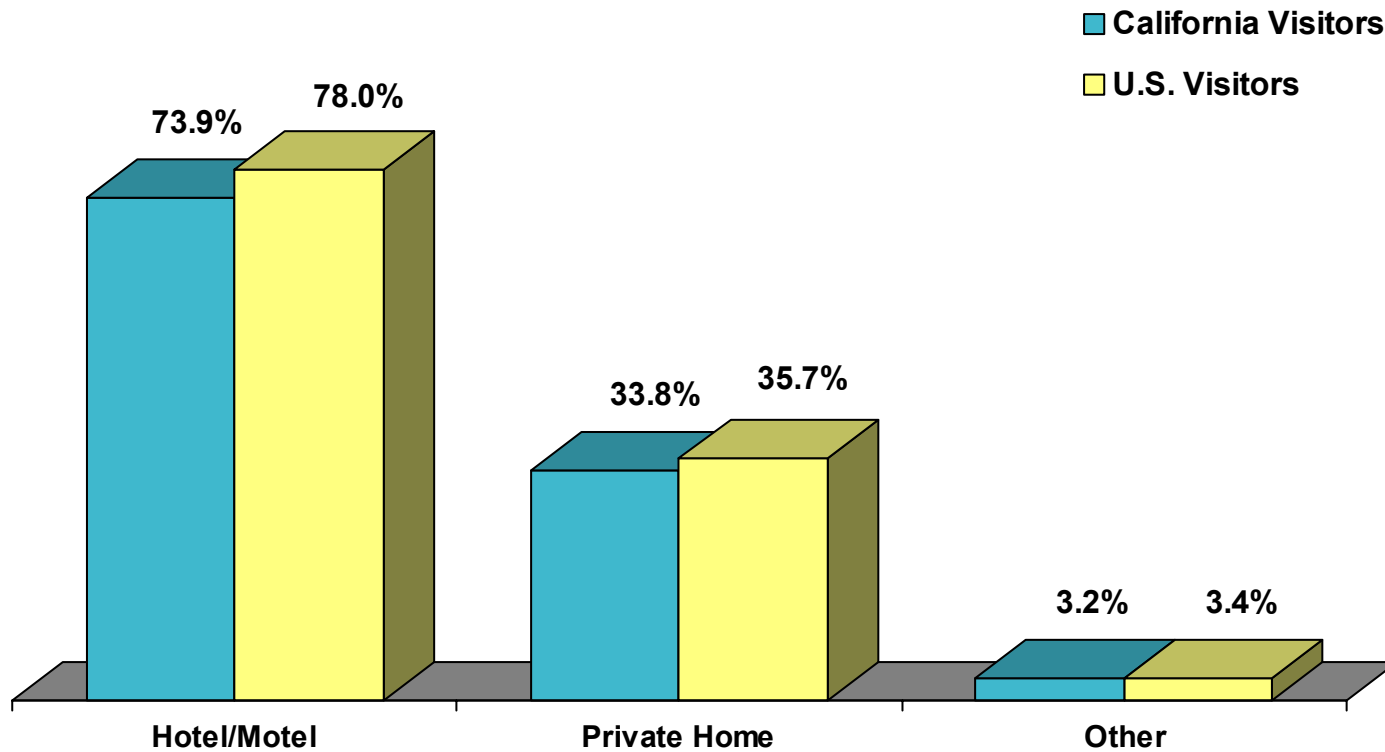
**Caution - Small sample size

Source: ITA/OTTI Survey of International Air Travelers, 2002.

CIC Research, Inc.

OVERSEAS VISITORS' ACCOMMODATIONS

OVERSEAS VISITORS TO CALIFORNIA / U.S. (2002)



Source: ITA "In-Flight" Survey, 2002
CIC Research, Inc.

Table 17

**ACCOMMODATIONS
OVERSEAS VISITORS TO CALIFORNIA
(2002)**

- As in previous years, a high proportion (74%) of overseas travelers to California reported staying in hotels or motels at some time during their trip. California visitors from Japan and the U.K. had the highest proportion of hotel or motel accommodations (83% and 82%, each respectively), while visitors from Taiwan made the highest use of private homes (49%).
- The proportion of overseas travelers to California who reported staying in a private home, tended to decrease from the fourth quarter 2001 (38%) to the fourth quarter 2002 (33%).

TYPE OF ACOMMODATIONS*	COUNTRY OF RESIDENCE OF VISITORS										FOURTH QUARTER 2001	FOURTH QUARTER 2002
	TOTAL OVERSEAS	JAPAN	U.K.	GERMANY	AUSTRALIA/ NEW ZEALAND	SOUTH AMERICA	FRANCE	TAIWAN	SOUTH KOREA	ITALY		
ESTIMATED TRAVELERS (Number of Respondents)	4,053,000 (6,875)	653,000 (1,483)	660,000 (800)	236,000 (314)	256,000 (1,009)	185,000 (354)	190,000 (177)	184,000 (966)	256,000 (78)**	93,000 (93)**	720,000 (1,185)	933,000 (1,635)
Hotel / Motel	73.9%	83.4%	81.9%	79.3%	74.6%	72.4%	64.9%	59.3%	70.0%	78.6%	71.3%	73.5%
Average Nights in Dest.	5.9	5.1	5.4	6.7	5.3	8.7	5.8	6.5	5.1	5.9	5.9	6.1
Median Nights in Dest.	4.0	3.0	4.0	6.0	4.0	5.0	4.0	4.0	4.0	5.0	4.0	4.0
Private Home	33.8%	20.1%	29.3%	31.5%	31.7%	37.3%	37.4%	49.0%	31.7%	26.6%	37.9%	32.6%
Average Nights in Dest.	14.3	16.9	10.1	11.8	17.4	17.1	10.1	19.4	16.7	16.4	18.1	13.3
Median Nights in Dest.	8.0	7.0	7.0	7.0	10.0	10.0	8.0	8.0	10.0	10.0	8.0	7.0
Other	3.2%	1.4%	2.6%	8.5%	3.8%	2.6%	9.3%	3.1%	2.4%	4.4%	3.7%	1.9%

*Column percentages may not total to 100 percent due to multiple responses.

**Caution - Small sample size

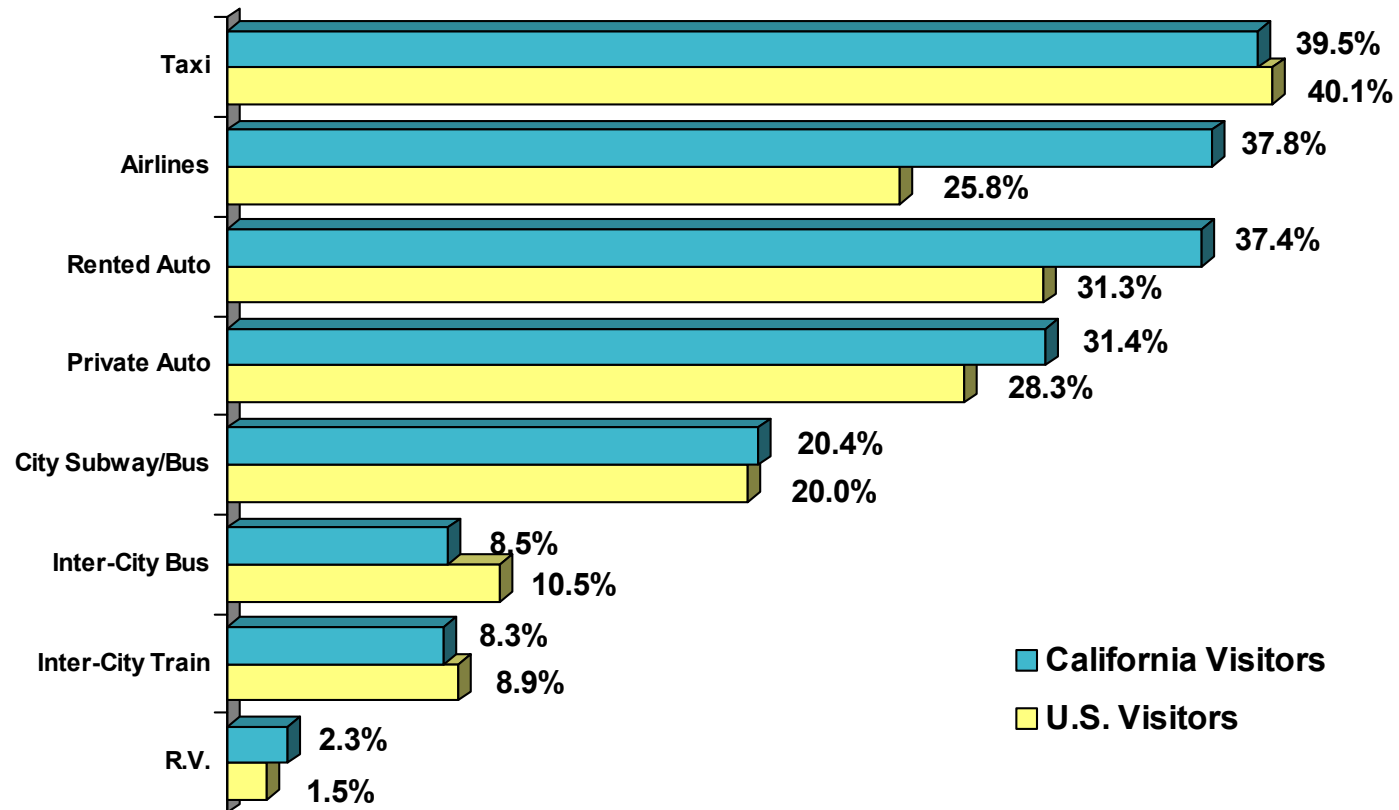
Source: ITA/OTTI Survey of International Air Travelers, 2002.

CIC Research, Inc.

TRANSPORTATION WITHIN THE U.S.

OVERSEAS VISITORS TO CALIFORNIA / U.S.

(2002)



Source: ITA "In-Flight" Survey, 2002
CIC Research, Inc.

Table 18

**TRANSPORTATION IN THE U.S.
OVERSEAS VISITORS TO CALIFORNIA
(2002)**

- Transportation in the U.S. used by visitors to California was mostly taxi/cab/limousine (40%), airlines (38%), rented autos (37%), or company/private auto (31%).
- Visitors to California from Australia/New Zealand (48%) were most likely to use a taxi/cab/limousine. Visitors from South America (50%) were most likely to use airlines in the U.S. Visitors from Germany (57%) were most likely to rent an auto, while visitors from Taiwan (47%) were most likely to use a company or private auto.
- From the fourth quarter 2001 to 2002 use of a rented auto decreased significantly from 44% to 37% respectively.

TRANSPORTATION IN U.S.*	COUNTRY OF RESIDENCE OF VISITORS										FOURTH QUARTER 2001	FOURTH QUARTER 2002
	TOTAL OVERSEAS	JAPAN	U.K.	GERMANY	AUSTRALIA/ NEW ZEALAND	SOUTH AMERICA	FRANCE	TAIWAN	SOUTH KOREA	ITALY		
ESTIMATED TRAVELERS	4,053,000	653,000	660,000	236,000	256,000	185,000	190,000	184,000	256,000	93,000	720,000	933,000
(Number of Respondents)	(7,531)	(1,593)	(855)	(348)	(1,059)	(378)	(185)	(1,166)	(92)**	(98)**	(1,341)	(1,779)
Taxi/Cab/Limousine	39.5%	45.1%	44.3%	27.3%	48.0%	32.8%	28.7%	26.2%	41.5%	34.9%	38.2%	42.8%
Airlines in U.S.	37.8	39.5	38.8	28.0	48.2	49.5	22.3	39.3	35.4	40.1	37.5	39.3
Rented Auto	37.4	33.9	37.9	57.0	32.7	34.5	49.5	33.2	18.6	50.3	44.1	37.1
Company or Private Auto	31.4	38.8	28.7	25.0	36.5	25.8	22.7	47.1	37.1	21.3	31.5	32.3
City Subway/Tram/Bus	20.4	17.4	23.4	19.2	30.2	15.7	16.6	15.9	41.3	17.8	20.3	22.2
Bus between Cities	8.5	6.6	10.4	4.1	10.8	7.0	5.9	8.9	13.9	6.5	8.8	7.4
Railroad between Cities	8.3	6.7	6.1	8.8	12.6	9.2	15.2	4.2	10.2	3.3	8.1	7.6
Motor Home/Camper	2.3	0.6	1.5	5.3	1.6	0.4	3.0	1.7	-	-	2.1	2.8

*Column percentages may not total to 100 percent due to multiple responses.

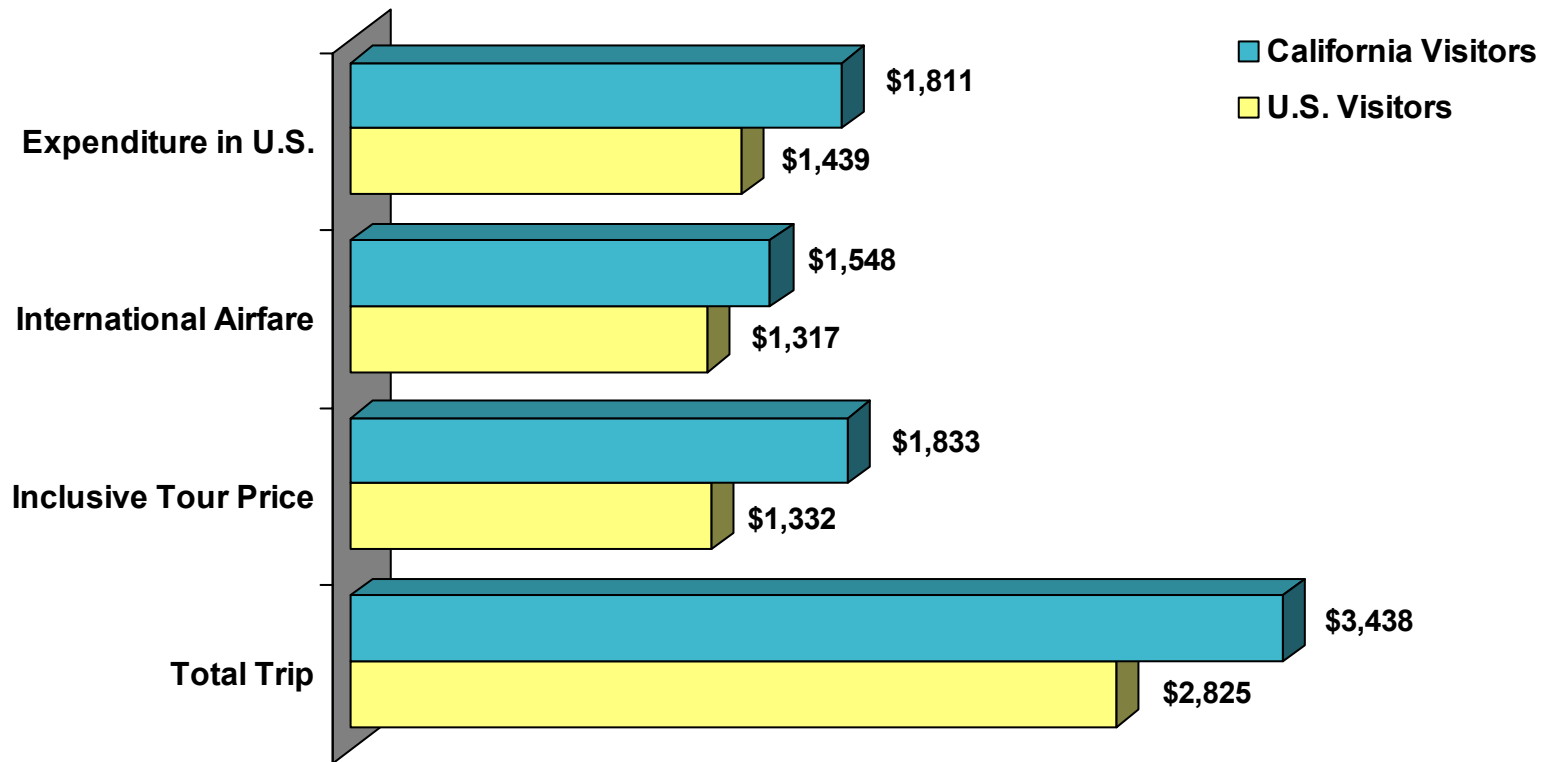
**Caution - Small sample size

Source: ITA/OTTI Survey of International Air Travelers, 2002.

CIC Research, Inc.

TRIP EXPENDITURES

OVERSEAS VISITORS TO CALIFORNIA / U.S. (2002)



Source: ITA "In-Flight" Survey, 2002
CIC Research, Inc.

Table 19

**EXPENDITURES
OVERSEAS VISITORS TO CALIFORNIA
(2002)**

- Overseas visitors to California reported spending approximately \$3,438 per capita on their entire trip away from home, down five percent from \$3,605 in 2001. More than half of the trip expenditures were made in the U.S., and the remaining expenditures outside the U.S. were almost entirely for international airfares.
- With the exception of International Airfare, visitors to California surveyed during the fourth quarter 2001 tended to spend more on average in all categories, compared with visitors surveyed during the fourth quarter 2002.

AVERAGE PER VISITOR TRIP EXPENDITURES	COUNTRY OF RESIDENCE OF VISITORS										FOURTH QUARTER	FOURTH QUARTER
	TOTAL OVERSEAS	JAPAN	U.K.	GERMANY	AUSTRALIA/ NEW ZEALAND	SOUTH AMERICA	FRANCE	TAIWAN	SOUTH KOREA	ITALY	2001	2002
ESTIMATED TRAVELERS	4,053,000	653,000	660,000	236,000	256,000	185,000	190,000	184,000	256,000	93,000	720,000	933,000
TOTAL TRIP	\$3,438	\$3,514	\$3,355	\$3,610	\$4,145	\$3,530	\$3,452	\$3,437	\$2,606	\$2,805	\$3,773	\$3,509
(Number of Respondents)	(4,486)	(931)	(526)	(216)	(727)	(208)	(102)	(612)	(51)**	(54)**	(791)	(1,102)
INCLUSIVE TOUR PRICE	\$1,833	\$1,424	\$2,345	\$2,456	\$2,054	\$1,827	\$2,313	\$1,118	\$401	\$3,854	\$2,169	\$1,551
(Number of Respondents)	(696)	(160)	(139)	(26)**	(117)	(26)**	(24)**	(94)**	(11)**	(3)**	(81)**	(155)
INTERNATIONAL AIRFARE	\$1,548	\$1,734	\$1,673	\$1,579	\$1,999	\$1,213	\$1,472	\$1,295	\$1,104	\$1,074	\$1,466	\$1,588
(Number of Respondents)	(5,482)	(1,016)	(608)	(261)	(875)	(277)	(130)	(818)	(66)**	(77)**	(975)	(1,325)
EXPENDITURE IN U.S.*	\$1,811	\$1,739	\$1,471	\$1,837	\$2,014	\$2,002	\$1,971	\$2,025	\$1,577	\$1,579	\$2,325	\$1,856
(Per Day)	\$88	\$142	\$90	\$88	\$85	\$102	\$119	\$107	\$38	\$114	\$100	\$100
(Number of Respondents)	(5,621)	(1,186)	(642)	(268)	(870)	(270)	(128)	(796)	(60)**	(62)**	(1,019)	(1,376)
MEAN ITEMIZED EXPENDITURES IN U.S.*												
(Number of Respondents)	(5,621)	(1,186)	(642)	(268)	(870)	(270)	(128)	(796)	(60)**	(62)**	(1,019)	(1,376)
TRANSPORT IN U.S.	\$292	\$241	\$208	\$273	\$313	\$287	\$332	\$413	\$412	\$326	\$326	\$290
LODGING IN U.S.	\$534	\$554	\$467	\$657	\$592	\$641	\$783	\$463	\$316	\$454	\$671	\$549
FOOD, BEVERAGES	\$351	\$295	\$346	\$400	\$466	\$347	\$465	\$346	\$295	\$319	\$432	\$330
GIFTS, SOUVENIRS	\$316	\$297	\$202	\$229	\$285	\$427	\$188	\$416	\$331	\$253	\$375	\$338
ENTERTAINMENT	\$162	\$122	\$172	\$145	\$209	\$137	\$127	\$184	\$119	\$87	\$238	\$194
OTHER	\$127	\$186	\$58	\$117	\$130	\$144	\$63	\$164	\$22	\$126	\$254	\$116
AVERAGE NIGHTS IN U.S.	20.6	12.3	16.3	20.8	23.8	19.6	16.6	19.0	41.8	13.9	23.1	18.5
AVERAGE NIGHTS IN CALIF.	9.7	7.9	7.9	10.7	10.1	12.9	8.5	13.6	9.2	9.5	11.6	9.2
MEDIAN NIGHTS IN CALIFORNIA	5.0	4.0	5.0	7.0	5.0	7.0	6.0	6.0	4.0	7.0	5.0	5.0

*Overseas visitors on exclusive tour packages were excluded.

**Caution - Small sample size.

Source: ITA/OTTI Survey of International Air Travelers, 2002.
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Table 20

EXPENDITURES
OVERSEAS VISITORS WHO REPORTED ONLY CALIFORNIA DESTINATIONS*
(2002)

- Forty-four percent (44%) of overseas visitors to California did not visit any other state in the U.S. These California-only visitors reported spending \$3,118 per capita on their entire trip away from home, up slightly from \$3,060 per visitor in 2001. Half (50%) of their total trip expenditures were in California (\$1,548).
- Average daily California expenses for California-only visitors were \$99 per day, the same as in 2001. This result is higher than the average daily expenditure for all overseas visitors to California (\$88).

<u>AVERAGE PER VISITOR TRIP EXPENDITURES</u>	<u>ALL CALIFORNIA-ONLY VISITORS</u>
TOTAL TRIP	\$3,118
(NUMBER OF RESPONDENTS)	(2,124)
INCLUSIVE TOUR PRICE	\$1,909
(NUMBER OF RESPONDENTS)	(199)
INTERNATIONAL AIRFARE	\$1,513
(NUMBER OF RESPONDENTS)	(2,630)
EXPENDITURE IN CALIFORNIA	\$1,548
PER DAY	\$99
(NUMBER OF RESPONDENTS)	(2,743)
<u>AVERAGE ITEMIZED EXPENDITURES IN CALIFORNIA</u>	
(NUMBER OF RESPONDENTS)	(2,743)
TRANSPORT IN U.S.	\$212
LODGING	\$452
FOOD, BEVERAGES	\$293
GIFTS, SOUVENIRS	\$320
ENTERTAINMENT	\$125
OTHER	\$113
<u>AVERAGE NIGHTS IN CALIFORNIA</u>	11.9

*Overseas visitors could report up to seven U.S. destinations.

Source: ITA/OTTI Survey of International Air Travelers, 2002.

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**OVERSEAS LEISURE VISITORS
TO CALIFORNIA¹
(2002)**

¹ Leisure visitors are defined as those visitors whose main purpose of trip is vacation/holidays or visiting friends and relatives.

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Table 21
RESIDENCE OF OVERSEAS LEISURE VISITORS TO THE UNITED STATES AND CALIFORNIA
(2002)

Residence of Visitors	UNITED STATES		CALIFORNIA		
	Number of Visitors To The U.S.	Percent Of Total U.S. Visitors	Number Of Visitors To California	Percent Of California Total	CA Share Of Visitors From This Country
EUROPE	5,584,000	40.4%	1,055,000	47.4%	18.9%
W. EUROPE	5,392,000	39.0%	1,041,000	46.8%	19.3%
Austria	38,000	0.3%	11,000	0.5%	29.8%
Belgium	89,000	0.6%	8,000	0.4%	9.4%
Denmark	60,000	0.4%	17,000	0.8%	29.1%
France	448,000	3.2%	136,000	6.1%	30.4%
Germany	641,000	4.6%	129,000	5.8%	20.2%
Ireland	181,000	1.3%	28,000	1.3%	15.7%
Italy	211,000	1.5%	55,000	2.5%	25.8%
Netherlands	201,000	1.5%	51,000	2.3%	25.3%
Norway	80,000	0.6%	27,000	1.2%	34.0%
Spain	171,000	1.2%	19,000	0.9%	10.9%
Sweden	119,000	0.9%	33,000	1.5%	27.6%
Switzerland	124,000	0.9%	35,000	1.6%	28.4%
United Kingdom	2,857,000	20.7%	466,000	20.9%	16.3%
Other Western Europe	172,000	1.3%	26,000	1.2%	14.9%
E. EUROPE	169,000	1.2%	17,000	0.8%	10.3%
CARIBBEAN	702,000	5.1%	5,000	0.2%	0.7%
Bahamas	165,000	1.2%	--	--	--
Dominican Rep	98,000	0.7%	--	--	--
Jamaica	138,000	1.0%	1000	--	0.9%
Trinidad & Tobago	82,000	0.6%	--	--	--
Other Caribbean	219,000	1.6%	4,000	0.2%	1.8%

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Table 21 (continued)

Residence of Visitors	UNITED STATES		CALIFORNIA		
	Number of Visitors To The U.S.	Percent Of Total U.S. Visitors	Number Of Visitors To California	Percent Of California Total	CA Share Of Visitors From This Country
SOUTH AMERICA	1,088,000	7.9%	86,000	3.9%	7.9%
Argentina	79,000	0.6%	13,000	0.6%	17.0%
Brazil	201,000	1.5%	34,000	1.5%	17.0%
Chile	61,000	0.4%	5,000	0.2%	7.5%
Colombia	221,000	1.6%	11,000	0.5%	5.2%
Ecuador	76,000	0.6%	1000	0.0%	1.1%
Peru	108,000	0.8%	9,000	0.4%	8.4%
Venezuela	275,000	2.0%	7,000	0.3%	2.4%
Other South America	67,000	0.4%	6,000	0.3%	9.1%
CENTRAL AMERICA	469,000	3.4%	55,000	2.5%	11.7%
Costa Rica	71,000	0.5%	6,000	0.3%	8.3%
Guatemala	105,000	0.8%	6,000	0.3%	5.5%
Honduras	55,000	0.4%	1,000	0.0%	1.4%
Other Central America	238,000	1.7%	42,000	1.9%	17.7%
AFRICA	129,000	0.9%	4,000	0.2%	3.3%
Morocco	8,000	0.1%	1,000	--	6.7%
South Africa, Rep. of	24,000	0.2%	2,000	0.1%	8.5%
Other Africa	97,000	0.6%	1,000	--	1.7%
OCEANIA	475,000	3.4%	147,000	6.6%	30.9%
Australia	256,000	1.9%	118,000	5.3%	46.2%
New Zealand	54,000	0.4%	28,000	1.3%	51.8%
Other Oceania	165,000	1.1%	1,000	--	0.5%

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Table 21 (continued)

Residence of Visitors	UNITED STATES		CALIFORNIA		
	Number of Visitors To The U.S.	Percent Of Total U.S. Visitors	Number Of Visitors To California	Percent Of California Total	CA Share Of Visitors From This Country
FAR EAST	5,007,000	36.2%	816,000	36.7%	16.3%
Hong Kong	63,000	0.5%	34,000	1.5%	54.1%
India	118,000	0.9%	32,000	1.4%	27.3%
Indonesia	22,000	0.2%	15,000	0.7%	66.2%
Japan	2,796,000	20.2%	322,000	14.5%	11.5%
Korea, South	384,000	2.8%	132,000	5.9%	34.5%
People's Republic of China	100,000	0.7%	62,000	2.8%	62.1%
Philippines	99,000	0.7%	77,000	3.5%	77.5%
Republic of China*	133,000	1.0%	86,000	3.9%	64.3%
Singapore	30,000	0.2%	18,000	0.8%	60.4%
Thailand	37,000	0.3%	23,000	1.0%	61.7%
Other Far East	1,225,000	8.7%	15,000	0.7%	1.4%
MIDDLE EAST	392,000	2.8%	51,000	2.3%	13.1%
Egypt	16,000	0.1%	--	--	--
Israel	168,000	1.2%	35,000	1.6%	21.0%
Saudi Arabia	13,000	0.1%	3,000	0.1%	21.1%
Turkey	40,000	0.3%	7,000	0.3%	17.8%
Other Middle East	155,000	1.1%	6,000	0.3%	4.1%
Total Overseas Leisure Visitors	13,823,000	99.9%	2,226,000	100.0%	16.1%
(Number of Respondents)	(16,097)		(3,801)		

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Table 22

**MAIN DESTINATION BY STATE
OVERSEAS LEISURE VISITORS TO CALIFORNIA
(2002)**

- California was the main U.S. state destination for almost three-quarters (73%) of overseas leisure travelers to California in 2002, similar to the proportion from previous years. The highest proportion of leisure travelers, whose main destination was California, was from Taiwan (89%), while the lowest proportion was from Australia/New Zealand (50%).

MAIN DESTINATION*	COUNTRY OF RESIDENCE OF VISITORS										FOURTH QUARTER 2001	FOURTH QUARTER 2002
	TOTAL OVERSEAS	JAPAN	U.K.	GERMANY	AUSTRALIA/ NEW ZEALAND	SOUTH AMERICA	FRANCE	TAIWAN	SOUTH KOREA	ITALY		
ESTIMATED TRAVELERS	2,226,000	322,000	466,000	129,000	146,000	86,000	136,000	86,000	132,000	55,000	362,000	522,000
(Number of Respondents)	(2,840)	(573)	(504)	(146)	(391)	(130)	(87)**	(395)	(39)**	(44)**	(497)	(678)
California	72.7%	82.2%	66.2%	73.4%	49.7%	81.2%	73.3%	89.3%	63.2%	66.3%	73.3%	71.4%
Hawaiian Islands	3.3	5.2	4.9	4.9	1.2	0.1	0.6	1.8	-	0.4	0.8	2.6
New York	2.1	1.4	1.5	-	10.7	0.1	2.1	1.3	-	10.9	2.4	2.6
Florida	2.1	0.2	4.0	1.2	4.8	6.1	-	0.2	-	-	1.1	2.6
Nevada	2.0	4.5	3.6	1.8	0.5	1.9	-	0.4	-	-	2.9	2.7
Massachusetts	0.3	0.1	0.3	-	0.4	-	-	0.7	-	-	0.8	0.3

*Visitors may report only one destination -- States with less than 1% response were not listed.

**Caution-Small sample size

Source: ITA/OTTI Survey of International Air Travelers, 2002.
CIC Research, Inc.

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Table 23

**PURPOSE OF TRIP
OVERSEAS LEISURE VISITORS TO CALIFORNIA
(2002)**

- For overseas leisure travelers to California, 78 percent reported being on vacation/holiday, while 56 percent reported visiting friends or relatives, similar to results from previous years. South Korea (93% - caution, small sample size), Germany (88%) followed by the U.K. (85%) leisure visitors to California had the highest proportion of travelers on vacation/holiday in 2002.
- While high proportions of leisure travelers to California in both the fourth quarter 2002 and 2001 reported being on holiday, a significantly lower proportion of travelers in the fourth quarter 2002 (53%) than the fourth quarter 2001(64%), reported visiting friends and relatives.

PURPOSE OF TRIP*	COUNTRY OF RESIDENCE OF VISITORS										FOURTH QUARTER 2001	FOURTH QUARTER 2002
	TOTAL OVERSEAS	JAPAN	U.K.	GERMANY	AUSTRALIA/ NEW ZEALAND	SOUTH AMERICA	FRANCE	TAIWAN	SOUTH KOREA	ITALY		
ESTIMATED TRAVELERS	2,226,000	322,000	466,000	129,000	146,000	86,000	136,000	86,000	132,000	55,000	362,000	522,000
(Number of Respondents)	(3,801)	(737)	(641)	(194)	(567)	(163)	(116)	(527)	(50)**	(56)**	(655)	(910)
Vacation/ Holidays	77.8%	82.9%	85.2%	87.5%	75.1%	68.3%	79.7%	70.0%	92.8%	81.7%	76.1%	80.3%
Visit Friends/Relatives	55.9	47.9	48.5	53.2	63.5	64.4	45.1	75.7	41.8	41.3	64.4	53.1
Business	5.2	2.1	4.0	3.3	10.3	7.0	7.9	3.2	11.0	0.6	7.7	5.0
Study	2.4	3.1	0.7	-	1.8	3.8	-	5.1	13.4	1.7	3.6	4.8
Attend Convention	1.2	1.2	0.7	0.7	3.3	1.3	1.7	2.0	-	1.1	1.3	1.2
Other	2.1	2.3	1.0	1.1	1.4	1.2	0.9	0.8	0.6	5.4	2.8	2.6

*Column percentages may total more than 100 percent due to multiple responses.

**Caution - Small sample size

Source: ITA/OTTI Survey of International Air Travelers, 2002.
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Table 24

**LEISURE-RECREATION ACTIVITIES
OVERSEAS LEISURE VISITORS TO CALIFORNIA
(2002)**

- Overseas leisure visitors reported a greater participation rate in almost all activities, compared with all overseas visitors to California (Table 6). Shopping, dining and sightseeing in cities were the most common leisure and recreation activities of overseas leisure visitors to California.

LEISURE/RECREATION ACTIVITIES*	TOTAL OVERSEAS	COUNTRY OF RESIDENCE OF VISITORS									FOURTH QUARTER 2001	FOURTH QUARTER 2002
		JAPAN	U.K.	GERMANY	AUSTRALIA/ NEW ZEALAND	SOUTH AMERICA	FRANCE	TAIWAN	SOUTH KOREA	ITALY		
ESTIMATED TRAVELERS	2,226,000	322,000	466,000	129,000	146,000	86,000	136,000	86,000	132,000	55,000	362,000	522,000
(Number of Respondents)	(3,626)	(707)	(620)	(189)	(547)	(144)	(114)	(490)	(49)**	(53)**	(621)	(863)
Shopping	88.8%	89.3%	93.8%	83.5%	90.4%	75.8%	90.8%	92.6%	70.9%	77.2%	87.3%	90.1%
Dining in Restaurants	83.5	86.0	94.1	81.2	85.7	73.5	76.5	79.1	55.0	75.5	83.5	82.9
Sightseeing in Cities	59.5	60.7	65.6	43.0	64.0	46.7	68.3	61.1	60.8	46.5	56.0	60.6
Amusement/Theme Parks	45.8	45.5	43.7	41.0	51.1	46.5	44.8	51.9	51.9	39.0	41.4	46.0
Visit National Parks	43.4	24.0	46.5	65.9	38.0	34.9	61.0	32.9	53.5	61.0	39.9	41.0
Visit Small Towns	45.7	39.2	47.2	48.3	48.0	57.0	33.6	27.0	32.9	51.3	46.0	42.6
Visit Historical Places	45.1	15.5	56.6	63.1	58.2	53.5	55.5	29.8	26.4	36.1	48.2	44.8
Touring Countryside	39.8	18.9	46.4	58.8	45.2	23.9	25.3	17.8	50.3	27.2	44.6	36.6
Casinos/Gambling	30.1	22.1	30.8	30.4	23.8	24.2	39.9	39.4	43.2	33.5	30.0	33.3
Cultural Heritage Sites	27.3	14.2	32.9	50.0	31.9	20.2	38.8	20.0	28.7	13.0	30.9	25.9
Art Gallery/Museum	24.9	11.8	29.6	23.7	30.9	28.1	27.4	18.1	39.6	12.1	23.9	21.9
Water Sports/Sunbathing	24.5	7.5	37.2	33.8	29.3	21.7	17.5	10.2	11.2	17.4	24.5	17.6
Guided Tours	23.9	19.6	33.6	20.4	32.6	10.2	11.7	25.8	35.4	12.8	18.7	28.8
Concert/Play/Musical	15.3	10.8	16.9	15.7	19.7	25.0	15.3	10.8	9.9	1.3	15.5	15.0
Nightclubs/Dancing	14.2	6.0	13.8	13.4	25.0	25.1	15.8	7.8	6.2	12.5	16.5	13.5
Camping/Hiking	9.0	1.7	9.2	24.0	7.3	6.2	15.4	2.9	6.0	7.4	14.5	5.6
Cruises	7.8	9.5	6.2	4.8	11.2	4.3	0.7	8.2	19.2	7.6	4.1	12.1
Attend Sports Event	7.6	6.4	9.7	13.3	16.0	9.6	1.5	2.8	0.3	4.3	9.8	6.7
Ethnic Heritage Sites	7.5	2.0	11.6	6.0	7.4	0.2	10.5	4.6	3.4	2.4	9.3	6.9
Golfing/Tennis	7.2	8.0	8.6	5.5	5.1	7.3	3.2	8.5	5.3	10.9	6.0	7.1
Visit Am. Indian Comm.	6.4	3.3	8.7	15.6	5.9	8.3	7.8	3.1	1.1	23.0	6.2	5.9
Environ./Eco. Excursions	5.7	5.3	7.2	3.5	3.7	4.7	13.9	9.6	1.7	10.0	5.2	5.3
Snow Skiing	3.5	0.4	1.7	2.3	9.2	5.0	1.5	2.8	0.3	1.8	3.5	4.3
Hunting/Fishing	2.2	0.7	1.9	0.7	2.5	0.8	3.1	1.4	1.9	1.8	2.5	1.7
Ranch Vacations	2.0	1.0	2.5	0.8	1.2	1.4	5.8	4.0	2.8	1.8	1.8	1.1

*Multiple response. Only responses greater than 1.0 percent are detailed.

**Caution -Small sample size

Source: ITA/OTTI Survey of International Air Travelers, 2002.

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Table 25

**ADVANCE TRIP DECISION
OVERSEAS LEISURE VISITORS TO CALIFORNIA
(2002)**

- Overseas leisure visitors to California reported a median advance trip decision period of 60 days, much longer than all overseas visitors to California (30 median days) found in Table 7. The advance airline ticket reservation period for leisure visitors was half as long as their trip decision period (30 median days) and slightly longer than all overseas visitors to California (21 median days).
- The median advance trip decision period among leisure travelers to California, tended to be shorter in the fourth quarter 2002 (55 days) than in the fourth quarter 2001 (60 days).

ADVANCE TRIP DECISION*	COUNTRY OF RESIDENCE OF VISITORS										FOURTH QUARTER 2001	FOURTH QUARTER 2002
	TOTAL OVERSEAS	JAPAN	U.K.	GERMANY	AUSTRALIA/ NEW ZEALAND	SOUTH AMERICA	FRANCE	TAIWAN	SOUTH KOREA	ITALY		
ESTIMATED TRAVELERS	2,226,000	322,000	466,000	129,000	146,000	86,000	136,000	86,000	132,000	55,000	362,000	522,000
(Number of Respondents)	(3,645)	(710)	(615)	(187)	(547)	(159)	(112)	(505)	(46)**	(54)**	(619)	(872)
14 Days or Less	13.8%	14.8%	9.3%	6.2%	10.4%	8.2%	13.0%	24.7%	18.4%	13.3%	17.1%	12.4%
15 - 60 Days	45.2	62.2	28.8	25.1	33.4	57.7	34.5	63.1	72.7	59.1	37.9	49.9
61 - 120 Days	18.6	17.5	21.7	27.1	21.7	22.6	24.0	7.2	7.3	9.5	18.6	17.4
121 - 180 Days	11.0	4.4	15.3	21.3	16.1	7.2	10.6	2.7	1.7	15.1	10.4	10.5
181 Days or More	11.4	1.1	24.8	20.4	18.3	4.3	17.9	2.3	-	3.0	16.1	9.7
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Average No. of Days	90.0	54.8	133.1	135.8	124.6	76.0	106.4	42.3	31.9	70.6	100.1	83.8
Median No. of Days	60.0	50.0	90.0	100.0	90.0	45.0	80.0	30.0	22.0	40.0	60.0	55.0
ADVANCE AIRLINE RESERVATIONS*												
ESTIMATED TRAVELERS	2,226,000	322,000	466,000	129,000	146,000	86,000	136,000	86,000	132,000	55,000	362,000	522,000
(Number of Respondents)	(3,468)	(648)	(596)	(178)	(534)	(142)	(109)	(465)	(46)**	(54)**	(595)	(852)
14 Days or less	26.7%	28.5%	15.4%	14.6%	22.6%	17.9%	16.1%	47.2%	68.1%	28.8%	28.4%	29.0%
15 - 60 Days	48.0	61.3	34.7	39.7	45.0	64.1	47.4	49.0	31.8	52.4	41.1	45.2
61 - 120 Days	13.4	9.2	19.7	20.6	20.2	10.8	16.3	3.3	0.0	10.3	13.2	14.0
121 - 180 Days	7.0	0.7	15.2	21.3	7.1	4.4	10.2	0.1	-	8.5	10.1	6.8
181 Days or More	4.9	0.4	15.0	3.9	5.1	2.7	10.0	0.3	-	-	7.1	5.1
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Mean No. of Days	56.0	35.7	98.8	84.0	65.7	48.5	70.5	21.9	12.5	44.5	64.2	56.1
Median No. of Days	30.0	30.0	60.0	60.0	45.0	30.0	40.0	15.0	7.0	30.0	30.0	30.0

*Column percentages may not total to 100 percent due to rounding.

**Caution - Small sample size

Source: ITA/OTTI Survey of International Air Travelers, 2002.
CIC Research, Inc.

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Table 26
**MEANS OF BOOKING AIR TRIP AND LODGING
OVERSEAS LEISURE VISITORS TO CALIFORNIA
(2002)**

- Travel agents booked a high proportion of airline ticket reservations for all overseas leisure travelers to California. The proportion of travel agent air bookings ranged from a low of 52 percent for leisure travelers from France, to a high of 84 percent of leisure travelers from South Korea (caution – small sample size).
- Approximately one in six (16%) leisure travelers booked with the airline directly.
- Travel agents played a less significant role in booking U.S. lodging reservations (27%) than in booking airline reservations (64%).
- Leisure travelers to California during the fourth quarter 2002 were significantly more likely to pre-book their lodging via a travel agent, than those during the fourth quarter 2001 (27% versus 18% respectively).

COUNTRY OF RESIDENCE OF VISITORS											FOURTH QUARTER 2001	FOURTH QUARTER 2002
MEANS OF BOOKING AIR TRIP*	Total Overseas	Japan	U.K.	Germany	Australia/ New Zealand	South America	France	Taiwan	South Korea	Italy		
ESTIMATED TRAVELERS	2,226,000	322,000	466,000	129,000	146,000	86,000	136,000	86,000	132,000	55,000	362,000	522,000
(Number of Respondents)	(3,718)	(723)	(626)	(189)	(556)	(160)	(114)	(517)	(49)**	(54)**	(638)	(896)
Travel Agent	63.8%	67.6%	54.2%	60.5%	75.5%	62.9%	51.9%	65.5%	84.1%	60.8%	65.0%	64.7%
Airline Directly	15.7	9.3	13.0	17.1	14.8	24.4	29.0	10.2	13.5	13.3	17.8	14.5
Personal Computer	8.4	9.3	13.3	10.4	3.8	3.9	8.1	5.8	0.8	9.2	6.1	7.4
Tour Operator	5.5	7.1	10.4	7.0	0.9	1.7	1.5	13.0	0.8	10.8	7.3	5.7
Company Travel Dept.	2.0	2.6	2.9	0.5	1.5	3.5	1.6	2.3	0.8	-	1.2	2.2
Travel Club	0.8	-	1.9	0.6	1.1	-	0.8	1.0	-	1.8	0.5	1.3
Other/Don't Know	3.8	4.0	4.4	4.1	2.5	3.8	7.1	2.1	0.0	4.2	2.1	4.2
TOTAL	100%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

MEANS OF BOOKING LODGING***											FOURTH QUARTER 2001	FOURTH QUARTER 2002
(Number of Respondents)	(3,673)	(679)	(630)	(190)	(559)	(154)	(114)	(518)	(48**)	(54**)		
Yes, Booked by:	50.9%	71.0%	60.2%	49.0%	53.5%	44.8%	37.7%	40.4%	38.1%	52.2%	43.6%	50.9%
Travel Agent	27.2%	36.9%	26.8%	25.8%	36.5%	24.2%	19.4%	23.4%	26.7%	18.8%	17.7%	27.0%
Hotel/Motel Directly	9.2	14.8	13.4	13.0	9.7	4.1	9.3	1.3	-	6.7	10.7	7.5
Friend or Relative	5.5	11.3	4.3	4.0	5.0	6.4	2.3	5.3	8.9	0.9	4.1	5.3
Tour Operator	4.9	6.4	8.7	5.6	0.7	1.1	2.8	6.4	3.6	8.9	5.6	4.6
Company Travel Dept.	1.7	2.0	2.3	2.3	1.0	0.9	0.2	1.0	3.7	1.8	0.7	2.8
Airline Staff	1.6	0.2	1.6	2.5	1.0	-	0.5	2.0	2.8	5.9	0.9	3.6
Business Associate	0.3	0.8	0.4	0.5	0.1	0.2	0.8	0.3	-	-	0.8	0.4
Other	6.9	8.6	10.2	6.4	7.9	10.7	2.8	2.4	2.2	9.3	9.0	7.3
No	49.1%	29.0%	39.8%	51.0%	46.5%	55.2%	62.3%	59.6%	61.9%	47.8%	56.4%	49.1%

*Column percentages may not total to 100 percent due to rounding.

**Caution - Small sample size

*** Multiple Response. Percentages based on total number of respondents.

Source: ITA/OTTI, Survey of International Air Travelers, 2002.

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Table 27

**U.S. TRIP INFORMATION SOURCES
OVERSEAS LEISURE VISITORS TO CALIFORNIA
(2002)**

- Travel agents were a key information source for trip information and travel planning across all countries of origin (54%), particularly for visitors from Australia/New Zealand (75%). Personal computer (30%) followed by friends and relatives (23%) were the next most frequently mentioned trip planning sources for leisure travelers to California. Leisure travelers from Germany reported the highest use of both of these sources (43% and 31% each respectively). In addition, German leisure travelers once again reported very high usage of government sources (37%) as well as published sources (24%) for travel information.

INFORMATION SOURCES*	COUNTRY OF RESIDENCE OF VISITORS										FOURTH QUARTER 2001	FOURTH QUARTER 2002
	Total Overseas	Japan	U.K.	Germany	Australia/ New Zealand	South America	France	Taiwan	South Korea	Italy		
ESTIMATED TRAVELERS (Number of Respondents)	2,226,000 (3,770)	322,000 (732)	466,000 (637)	129,000 (193)	146,000 (563)	86,000 (160)	136,000 (116)	86,000 (518)	132,000 (50)**	55,000 (55)**	362,000 (649)	522,000 (902)
Travel Agency	53.7%	56.5%	49.5%	36.7%	74.5%	52.7%	51.2%	55.3%	45.8%	63.0%	57.5%	53.1%
Personal Computer	30.2	34.7	33.4	42.5	27.6	21.7	32.3	23.3	18.7	30.1	31.9	28.8
Friends/Relatives	22.9	25.6	20.2	31.0	26.2	19.8	27.1	21.2	5.4	16.2	23.9	22.5
Airlines Directly	18.8	14.5	17.4	19.3	19.5	22.4	26.2	18.4	15.3	18.6	22.1	17.9
Published Sources	14.7	26.3	12.3	24.3	14.0	7.8	15.5	6.2	22.1	14.2	11.9	12.0
Newspapers/Magazines	7.3	8.0	5.4	6.4	3.9	8.2	2.2	4.7	19.6	3.9	8.9	9.8
Government Sources	7.2	3.3	2.1	37.1	5.1	4.3	6.6	3.4	17.4	1.7	4.7	4.4
Tour Company	6.5	10.6	12.0	10.7	1.6	4.2	3.6	5.0	7.2	1.4	7.3	6.6
Corporate Travel Dept.	2.2	3.7	2.0	1.8	1.1	1.2	3.9	1.6	7.3	-	3.4	3.2
TV/Radio Ads	1.8	4.2	2.4	2.9	2.0	-	0.3	0.4	-	-	3.2	1.0
In-flight Info. Systems	0.6	0.5	0.9	1.0	0.4	2.6	-	1.5	-	3.5	3.1	0.5

*Column percentages may not total to 100 percent due to multiple responses.

**Caution - Small sample size.

Source: ITA/OTTI, Survey of International Air Travelers, 2002.

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Table 28

**AIRLINE TICKET CLASS AND PREPAID TRIP PACKAGE
OVERSEAS LEISURE VISITORS TO CALIFORNIA
(2002)**

- Most (75%) overseas leisure travelers to California purchased a coach class ticket, particularly visitors from Italy (84% - caution, small sample size).
- Overseas leisure travelers to California during the fourth quarter of 2002 tended to make a significantly greater use of a prepaid package (18%) than leisure travelers to California during the fourth quarter of 2001 (11%).

TYPE OF AIRLINE TICKET	COUNTRY OF RESIDENCE OF VISITORS										FOURTH QUARTER 2001	FOURTH QUARTER 2002
	TOTAL OVERSEAS	JAPAN	U.K.	GERMANY	NEW ZEALAND	SOUTH AMERICA	FRANCE	TAIWAN	SOUTH KOREA	ITALY		
ESTIMATED TRAVELERS	2,226,000	322,000	466,000	129,000	146,000	86,000	136,000	86,000	132,000	55,000	362,000	522,000
(Number of Respondents)	(3,642)	(700)	(624)	(190)	(552)	(149)	(113)	(495)	(48)**	(54)**	(634)	(866)
Economy/Tourist/Coach	74.5%	66.1%	78.4%	78.1%	72.6%	76.1%	77.9%	67.7%	76.1%	83.8%	76.7%	70.8%
Executive/Business	10.7	14.9	7.7	13.2	8.2	8.4	10.1	16.6	15.6	12.2	12.0	13.9
Frequent Flyer Award	4.9	3.3	3.3	5.6	9.5	10.0	7.0	2.9	-	4.0	3.8	5.9
Discount/Group Fare	3.5	8.9	1.9	2.0	3.3	-	8.2	8.1	3.1	-	3.8	3.8
Frequent Flyer Upgrade	3.0	3.7	2.6	5.8	5.3	4.6	1.2	5.9	1.7	-	4.1	2.5
First Class	2.5	5.1	2.8	0.3	1.4	0.8	0.6	1.7	3.8	-	1.1	0.9
Non-revenue	2.2	2.3	2.4	2.1	2.4	3.3	-	0.6	-	-	2.5	2.3
Don't Know	3.9	6.1	4.1	1.7	4.3	2.6	2.5	1.1	-	-	2.3	3.0
USE OF PREPAID PACKAGE												
(Number of Respondents)	(3,704)	(722)	(639)	(189)	(560)	(154)	(113)	(509)	(47)**	(55)**	(638)	(886)
Yes***	17.4%	23.9%	23.3%	12.7%	21.8%	6.2%	16.8%	15.9%	23.0%	9.5%	10.9%	18.1%
Air/Lodging	13.2%	20.7%	17.8%	11.8%	17.6%	4.1%	10.3%	10.2%	16.0%	6.5%	7.0%	14.8%
Guided Tour	7.6	9.9	8.0	7.0	7.9	2.7	8.9	10.4	23.0	3.3	4.0	9.3
Air/Lodging/Tour	5.4	7.5	5.3	6.7	7.2	0.8	5.3	6.1	16.0	3.3	2.1	7.3
Air/Lodging/Bus	4.3	6.4	5.3	6.2	9.1	-	5.3	6.4	4.4	3.3	1.5	5.5
Air/Rent Car	6.5	0.7	9.2	5.8	10.5	2.4	8.9	4.3	10.7	3.0	4.7	7.7
Air/Lodging/Rent Car	4.8	0.3	7.0	5.1	8.7	2.1	5.1	3.0	10.7	-	3.1	6.9
Air/Lodging/Bus/Tour	2.8	2.9	2.3	6.2	4.9	-	5.3	5.8	4.4	3.3	1.2	3.1
Cruise	1.0	1.2	1.3	-	2.9	0.8	0.5	2.9	1.1	3.2	1.1	1.0
No	82.6	76.1	76.7	87.3	78.2	93.8	83.2	84.1	77.0	90.5	89.1	81.9
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

**Caution - Small sample size

***Multiple response. Includes all package combinations. Each category not mutually exclusive.

Source: ITA/OTTI, Survey of International Air Travelers, 2002.

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Table 29

**TRAVEL PARTY SIZE
OVERSEAS LEISURE VISITORS TO CALIFORNIA
(2002)**

- Approximately nine in ten (89%) of all leisure travel groups to California consisted of adults only, and 10 percent were adults traveling with children. The mean total party size for leisure travelers was 1.6 persons. These results are similar to those from previous years.

TRAVEL PARTY SIZE*	COUNTRY OF RESIDENCE OF VISITORS										FOURTH QUARTER 2001	FOURTH QUARTER 2002
	TOTAL OVERSEAS	JAPAN	U.K.	GERMANY	AUSTRALIA/ NEW ZEALAND	SOUTH AMERICA	FRANCE	TAIWAN	SOUTH KOREA	ITALY		
ESTIMATED TRAVELERS	2,226,000	322,000	466,000	129,000	146,000	86,000	136,000	86,000	132,000	55,000	362,000	522,000
(Number of Respondents)	(3,794)	(737)	(641)	(193)	(567)	(161)	(115)	(527)	(50)**	(56)**	(654)	(907)
Adults Only	89.6%	91.8%	89.5%	91.9%	88.5%	91.1%	89.6%	85.5%	88.7%	85.0%	93.8%	92.0%
Adults and Children	10.4	8.2	10.5	8.1	11.5	8.9	10.4	14.5	11.3	15.0	6.2	8.0
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Mean Total Party Size	1.6	1.7	1.8	1.5	1.6	1.4	1.7	1.6	1.4	1.9	1.5	1.6
Median Total Party Size	1.0	1.0	2.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0
ADULTS ONLY												
(Number of Respondents)	(3,259)	(673)	(558)	(174)	(491)	(141)	(94)**	(428)	(36)**	(46)**	(590)	(815)
Mean Adult Party Size	1.4	1.6	1.6	1.4	1.4	1.2	1.5	1.3	1.1	1.6	1.4	1.4
Median Adult Party Size	1.0	1.0	2.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0
ADULTS AND CHILDREN												
(Number of Respondents)	(535)	(64)**	(83)**	(19)**	(76)**	(20)**	(21)**	(99)**	(14)**	(10)**	(64)**	(92)**
Mean Party Size	3.4	3.4	3.5	3.1	3.5	3.2	3.5	3.2	3.7	3.7	3.5	3.5
Median Party Size	3.0	3.0	3.0	3.0	3.0	3.0	3.0	3.0	4.0	3.0	4.0	3.0

*Column percentages may total more than 100 percent due to rounding.

**Caution - Small sample size.

Source: ITA/OTTI Survey of International Air Travelers, 2002.
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Table 30

**SEX AND AGE
OVERSEAS LEISURE VISITORS TO CALIFORNIA
(2002)**

- Similar to previous years, 55 percent of overseas leisure travelers to California in 2002 were male, and 45 percent female. The median age for males in 2002 was 42 years, versus 38 years for females.

SEX AND AGE OF VISITOR*	COUNTRY OF RESIDENCE OF VISITORS										FOURTH QUARTER 2001	FOURTH QUARTER 2002
	TOTAL OVERSEAS	JAPAN	U.K.	GERMANY	AUSTRALIA/ NEW ZEALAND	SOUTH AMERICA	FRANCE	TAIWAN	SOUTH KOREA	ITALY		
ESTIMATED TRAVELERS	2,226,000	322,000	466,000	129,000	146,000	86,000	136,000	86,000	132,000	55,000	362,000	522,000
(Number of Respondents)	(3,545)	(686)	(614)	(179)	(536)	(145)	(104)	(469)	(46)**	(54)**	(608)	(848)
MALE ADULTS	54.8%	52.5%	54.4%	64.0%	43.7%	58.0%	57.0%	44.2%	48.3%	69.1%	56.8%	50.1%
18-24 Years	3.6	4.4	2.8	4.0	6.2	3.6	4.5	1.4	4.8	6.3	5.9	3.7
25 - 34 Years	13.2	14.1	10.7	20.7	6.1	19.8	8.9	10.1	20.2	16.8	14.0	10.6
35 - 54 Years	25.6	22.7	23.9	25.3	19.7	24.8	25.9	23.6	21.4	39.7	21.8	23.3
55 + Years	12.5	11.5	16.9	14.1	11.6	9.7	17.7	9.0	2.0	6.3	15.0	12.5
Average Male Age	43.3	42.0	45.8	42.4	43.9	40.0	46.7	44.1	35.5	39.0	43.0	44.0
Median Male Age	42.0	38.0	45.0	39.0	42.0	37.0	48.0	45.0	33.0	38.0	42.0	44.0
FEMALE ADULTS	45.2%	47.5%	45.6%	36.0%	56.3%	42.0%	43.0%	55.8%	51.7%	30.9%	43.2%	49.9%
18-24 Years	6.2	7.0	5.2	5.7	8.4	2.9	11.9	6.6	1.8	2.4	3.7	5.9
25 - 34 Years	13.5	15.2	11.5	8.0	10.2	12.0	15.3	19.1	23.1	15.5	13.4	14.7
35 - 54 Years	17.8	16.3	19.0	16.0	24.6	17.6	9.4	26.8	26.6	7.9	18.4	19.9
55 + Years	7.8	8.9	9.7	6.4	13.2	9.4	6.6	3.3	0.3	5.1	7.8	9.3
Average Female Age	40.0	39.5	42.0	40.6	42.8	42.3	36.3	36.4	37.2	39.0	41.4	41.4
Median Female Age	38.0	37.0	43.0	38.0	42.0	42.0	32.0	35.0	36.0	34.0	42.0	40.0

*Column percentages may not total to 100 percent due to rounding.

**Caution - Small sample size.

Source: ITA/OTTI Survey of International Air Travelers, 2002.
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Table 31

**ANNUAL HOUSEHOLD INCOME
OVERSEAS LEISURE VISITORS TO CALIFORNIA
(2002)**

- Overseas leisure travelers to California had a mean household income of \$77,400, compared to \$83,100 for all overseas travelers to California. The mean household income for leisure travelers increased in 2002 from \$73,400 in 2001.
- The median household income of overseas leisure travelers to California in the fourth quarter 2002 (\$65,500), was higher than in the fourth quarter 2001 (\$54,400).

ANNUAL HOUSEHOLD INCOME*	COUNTRY OF RESIDENCE OF VISITORS										FOURTH QUARTER 2001	FOURTH QUARTER 2002
	TOTAL OVERSEAS	JAPAN	U.K.	GERMANY	AUSTRALIA/ NEW ZEALAND	SOUTH AMERICA	FRANCE	TAIWAN	SOUTH KOREA	ITALY		
ESTIMATED TRAVELERS	2,226,000	322,000	466,000	129,000	146,000	86,000	136,000	86,000	132,000	55,000	362,000	522,000
(NUMBER OF RESPONDENTS)	(3,049)	(541)	(526)	(150)	(480)	(137)	(83)**	(429)	(39)**	(40)**	(556)	(740)
Under \$20,000	12.1%	6.3%	4.6%	7.9%	13.3%	28.5%	16.3%	11.2%	34.8%	11.8%	13.3%	8.6%
\$20,000 - \$59,000	37.0	40.9	36.5	44.6	48.9	35.9	39.1	41.9	19.7	41.1	41.9	37.5
\$60,000 - \$99,999	24.3	25.9	29.8	20.8	21.7	16.4	31.1	24.1	20.9	23.1	19.3	26.3
\$100,000 - \$139,999	11.3	12.0	11.3	12.1	7.3	11.4	4.9	12.1	13.6	10.9	9.7	14.6
\$140,000 - \$179,999	4.5	7.0	5.0	4.6	3.6	4.0	0.6	2.2	0.0	3.2	6.3	5.5
\$180,000 and over	10.7	7.8	12.8	10.0	5.2	3.9	8.0	8.5	10.9	9.8	9.5	7.6
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Average Annual Income	\$77,400	\$79,200	\$86,000	\$74,800	\$62,400	\$58,000	\$62,400	\$71,100	\$67,900	\$76,400	\$73,800	\$77,800
Median Annual Income	\$61,200	\$64,500	\$69,900	\$57,000	\$49,400	\$46,800	\$51,700	\$56,900	\$49,300	\$57,900	\$54,400	\$65,500

*Column percentages may not total to 100 percent due to rounding.

**Caution - Small sample size.

Source: ITA/OTTI Survey of International Air Travelers, 2002.
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Table 32

**NIGHTS AWAY FROM HOME
OVERSEAS LEISURE VISITORS TO CALIFORNIA
(2002)**

- Overseas leisure visitors to California had an average U.S. trip stay of 22 nights and an average stay in California of 11 nights. Consistent with previous years, Japanese leisure travelers reported the shortest trip stays in the U.S. and California (10 and 8 nights respectively). On the other hand, leisure travelers from South Korea reported the longest stay in the U.S. (47 nights – caution, small sample size) and leisure travelers from South America reported the longest stay in California (21 nights).
- There was a significant decrease in the average length of stay among leisure visitors to the U.S. from the fourth quarter 2001 (24 nights) to the fourth quarter 2002 (17 nights).

NIGHTS IN U.S.	COUNTRY OF RESIDENCE OF VISITORS										FOURTH QUARTER 2001	FOURTH QUARTER 2002
	TOTAL OVERSEAS	JAPAN	U.K.	GERMANY	AUSTRALIA/ NEW ZEALAND	SOUTH AMERICA	FRANCE	TAIWAN	SOUTH KOREA	ITALY		
ESTIMATED TRAVELERS	2,226,000	322,000	466,000	129,000	146,000	86,000	136,000	86,000	132,000	55,000	362,000	522,000
(Number of Respondents)	(3,784)	(737)	(641)	(194)	(567)	(162)	(115)	(519)	(50)**	(55)**	(651)	(906)
Mean No. Nights	21.5	10.4	16.0	20.5	24.1	28.7	18.5	20.0	46.6	17.6	24.3	17.4
Median No. Nights	14.0	6.0	14.0	19.0	17.0	18.0	15.0	10.0	15.0	15.0	14.0	12.0
NIGHTS IN CALIFORNIA												
(Number of Respondents)	(3,334)	(659)	(591)	(171)	(527)	(142)	(104)	(415)	(40)**	(54)**	(558)	(802)
Mean Nts. in Dest.	10.8	7.7	8.5	10.3	10.9	20.5	8.2	14.9	12.6	11.5	11.5	9.6
Median Nts. in Dest.	7.0	4.0	6.0	8.0	6.0	10.0	6.0	7.0	4.0	7.0	7.0	6.0

**Caution - Small sample size.

Source: ITA/OTTI Survey of International Air Travelers, 2002.
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Table 33

**PORT OF ENTRY
OVERSEAS LEISURE VISITORS TO CALIFORNIA
(2002)**

- Once again, Los Angeles was the major port of entry for all leisure travelers to California (40%) followed by San Francisco (20%).

PORT OF ENTRY*	COUNTRY OF RESIDENCE OF VISITORS										FOURTH QUARTER 2001	FOURTH QUARTER 2002
	TOTAL OVERSEAS	JAPAN	U.K.	GERMANY	AUSTRALIA/ NEW ZEALAND	SOUTH AMERICA	FRANCE	TAIWAN	SOUTH KOREA	ITALY		
ESTIMATED TRAVELERS	2,226,000	322,000	466,000	129,000	146,000	86,000	136,000	86,000	132,000	55,000	362,000	522,000
(Number of Respondents)	(3,801)	(737)	(641)	(194)	(567)	(163)	(116)	(527)	(50)**	(56)**	(655)	(910)
Atlanta, GA	2.4%	-	2.9%	4.6%	-	8.2%	11.3%	-	-	4.3%	2.7%	2.3%
Boston, MA	0.4	-	0.6	0.5	0.5%	-	0.9	-	-	-	-	0.2
Chicago, IL	4.1	0.8%	7.4	7.0	1.2	1.3	4.9	-	-	4.2	3.2	3.7
Cincinnati, OH	0.4	-	0.5	1.7	-	-	3.8	-	-	-	0.1	1.4
Dallas/Ft. Worth, TX	0.7	0.6	0.4	0.4	-	6.5	0.2	0.1%	-	-	0.5	0.5
Detroit, MI	0.3	0.1	0.6	0.5	-	-	-	-	-	-	1.3	0.5
Honolulu, HI	3.4	7.5	0.4	-	10.5	-	-	1.6	18.8%	-	0.4	6.4
Houston, TX	0.6	0.3	-	-	-	8.5	1.4	0.1	-	-	-	0.5
Los Angeles, CA	39.9	59.3	38.1	28.3	70.3	21.1	31.4	56.8	24.4	26.5	47.4	40.3
Miami, FL	3.2	0.1	1.1	0.7	0.6	45.1	1.8	-	-	3.3	4.4	5.0
Minn./St. Paul, MN	0.2	-	0.8	-	-	-	-	-	-	-	0.1	-
New York, NY	6.5	0.8	7.1	2.9	1.3	1.7	7.4	1.0	17.4	22.9	5.0	5.2
Newark, NJ	1.7	3.9	1.4	-	0.3	-	-	0.1	-	8.5	0.1	1.9
Orlando, FL	0.4	-	1.6	-	0.2	-	-	-	-	-	0.2	-
Philadelphia, PA	0.2	-	0.2	1.8	-	-	0.6	-	-	-	-	0.2
Portland, OR	-	-	-	-	-	-	-	-	-	-	-	-
San Francisco, CA	20.4	19.0	26.0	31.6	7.6	0.5	22.1	29.6	28.8	13.9	21.6	17.6
Seattle, WA	1.0	1.4	1.0	4.3	-	-	0.9	1.6	-	-	0.7	0.8
Washington, DC	2.2	-	2.3	4.3	0.6	-	2.5	-	3.4	4.8	1.5	1.0
Other Port	12.0	5.9	7.4	11.4	6.7	7.0	10.8	9.1	7.3	11.5	10.9	12.3
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

*Column percentages may not total to 100 percent due to rounding.

**Caution - Small sample size.

Source: ITA/OTTI Survey of International Air Travelers, 2002.

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Table 34

**ACCOMMODATIONS
OVERSEAS LEISURE VISITORS TO CALIFORNIA
(2002)**

- Two thirds (66%) of overseas leisure travelers to California reported staying in hotels or motels at some time during their trip. Hotel usage was highest among visitors from the U.K. (80%) followed by visitors from Italy (78% - caution, small sample size) and Japan (74%), and lowest among visitors from Taiwan (43%). A high proportion of Taiwanese (67%) and South American (56%) leisure travelers stayed in private homes.

TYPE OF ACOMMODATIONS*	COUNTRY OF RESIDENCE OF VISITORS										FOURTH QUARTER 2001	FOURTH QUARTER 2002
	TOTAL OVERSEAS	JAPAN	U.K.	GERMANY	AUSTRALIA/ NEW ZEALAND	SOUTH AMERICA	FRANCE	TAIWAN	SOUTH KOREA	ITALY		
ESTIMATED TRAVELERS (Number of Respondents)	2,226,000 (3,170)	322,000 (624)	466,000 (564)	129,000 (161)	146,000 (514)	86,000 (132)	136,000 (99)**	86,000 (384)	132,000 (37)**	55,000 (51)**	362,000 (537)	522,000 (766)
Hotel / Motel	65.7%	74.1%	80.2%	68.8%	69.9%	57.1%	55.5%	42.6%	58.2%	77.6%	64.3%	65.2%
Mean Nights in Dest.	5.8	4.3	6.0	6.8	6.1	15.8	5.0	6.0	3.6	6.1	5.8	5.7
Median Nights in Dest.	4.0	3.0	5.0	6.0	4.0	8.0	4.0	4.0	3.0	5.0	4.0	4.0
Private Home	43.8%	32.6%	30.9%	44.5%	36.1%	56.0%	39.5%	67.4%	45.5%	30.6%	47.4%	41.6%
Mean Nights in Dest.	14.7	13.8	10.4	10.1	17.6	22.2	10.2	18.7	23.0	20.2	15.0	13.0
Median Nights in Dest.	9.0	7.0	7.0	7.0	10.0	12.0	8.0	9.0	22.0	10.0	9.0	8.0
Other	4.3%	1.3%	3.0%	13.5%	3.8%	4.0%	14.0%	1.4%	2.5%	8.1%	5.1%	2.7%

*Column percentages may not total to 100 percent due to multiple responses.

**Caution - Small sample size.

Source: ITA/OTTI Survey of International Air Travelers, 2002.
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Table 35

**TRANSPORTATION IN THE U.S.
OVERSEAS LEISURE VISITORS TO CALIFORNIA
(2002)**

- Leisure travelers relied upon a variety of transportation within the U.S. including rental cars (36%), domestic flights (35%), private or company autos (34%) and taxis/limousines (32%). Rental car use was highest among German (58%), Italian (57% - caution, small sample size), and French leisure visitors (54%), and lowest among Taiwanese (26%) and Japanese leisure visitors (30%). Leisure visitors from South America and Australia/New Zealand relied heavily on domestic airline travel (44% and 47% respectively), whereas leisure visitors from Taiwan relied heavily on a company or private auto (56%).
- The proportion of overseas leisure travelers to California who relied upon a taxi/cab or limousine, was significantly higher during the fourth quarter 2002 (36%) than the fourth quarter 2001 (29%).

TRANSPORTATION IN U.S.*	COUNTRY OF RESIDENCE OF VISITORS										FOURTH QUARTER 2001	FOURTH QUARTER 2002
	TOTAL OVERSEAS	JAPAN	U.K.	GERMANY	AUSTRALIA/ NEW ZEALAND	SOUTH AMERICA	FRANCE	TAIWAN	SOUTH KOREA	ITALY		
ESTIMATED TRAVELERS	2,226,000	322,000	466,000	129,000	146,000	86,000	136,000	86,000	132,000	55,000	362,000	522,000
(Number of Respondents)	(3,495)	(691)	(601)	(183)	(522)	(142)	(110)	(475)	(47)**	(52)**	(608)	(826)
Rented Auto	36.2%	29.5%	38.6%	58.4%	34.2%	33.3%	54.1%	25.7%	5.8%	56.9%	38.6%	31.2%
Airlines in U.S.	34.8	36.4	35.1	22.1	47.3	43.8	24.9	29.9	37.5	35.1	33.9	35.4
Company or Private Auto	33.9	43.3	31.9	27.0	38.6	30.5	26.4	55.8	29.3	25.1	39.3	35.5
Taxi/Cab/Limousine	32.1	36.7	38.2	18.2	42.4	22.5	18.2	20.1	43.3	13.3	28.6	36.3
City Subway/Tram/Bus	23.6	19.6	28.4	22.0	33.2	16.3	17.2	16.6	58.2	13.4	24.9	27.6
Bus between Cities	11.3	10.3	10.4	6.9	13.3	11.3	4.8	11.9	26.4	10.1	10.5	10.6
Railroad between Cities	8.9	8.0	6.5	7.4	16.1	14.2	10.9	3.3	18.9	4.3	9.8	9.2
Motor Home/Camper	3.2	0.6	2.0	9.3	1.8	0.8	4.3	1.9	-	-	3.2	3.4

*Column percentages may not total to 100 percent due to multiple responses.

**Caution - Small sample size.

Source: ITA/OTTI Survey of International Air Travelers, 2002.

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Table 36

**TRIP EXPENDITURES
OVERSEAS LEISURE VISITORS TO CALIFORNIA
(2002)**

- Overseas leisure travelers in 2002 reported total expenditures in the U.S. of \$1,428, lower than that reported in 2001 (\$1,687). The 2002 mean daily expenditure was \$67 per visitor, down 19 percent from \$83 per day in 2001. As a comparison, all overseas travelers to California reported U.S. expenditures of \$1,811 or \$88 per day.

AVERAGE PER VISITOR TRIP EXPENDITURES	COUNTRY OF RESIDENCE OF VISITORS										FOURTH QUARTER 2001	FOURTH QUARTER 2002
	TOTAL OVERSEAS	JAPAN	U.K.	GERMANY	AUSTRALIA/ NEW ZEALAND	SOUTH AMERICA	FRANCE	TAIWAN	SOUTH KOREA	ITALY		
ESTIMATED TRAVELERS	2,226,000	322,000	466,000	129,000	146,000	86,000	136,000	86,000	132,000	55,000	362,000	522,000
TOTAL TRIP	\$2,668	\$2,311	\$2,613	\$2,911	\$3,148	\$2,897	\$2,904	\$3,021	\$2,701	\$2,931	\$3,041	\$2,751
(Number of Respondents)	(2,043)	(398)	(368)	(109)	(345)	(72)	(59)	(252)	(26)	(25)	(367)	(509)
INCLUSIVE TOUR PRICE	\$1,836	\$1,378	\$2,317	\$2,688	\$2,052	\$1,192	\$1,887	\$901	\$369	\$3,854	\$1,974	\$1,630
(Number of Respondents)	(530)	(144)	(132)	(19)**	(85)**	(8)**	(19)**	(52)**	(10)**	(3)**	(57)**	(128)
INTERNATIONAL AIRFARE	\$1,122	\$1,103	\$1,038	\$1,053	\$1,577	\$955	\$1,048	\$1,072	\$1,349	\$882	\$1,133	\$1,192
(Number of Respondents)	(2,470)	(383)	(421)	(131)	(422)	(103)	(74)**	(339)	(34)**	(40)**	(467)	(601)
EXPENDITURE IN U.S.*	\$1,428	\$1,182	\$1,242	\$1,589	\$1,449	\$1,666	\$1,836	\$1,834	\$1,528	\$1,607	\$1,792	\$1,364
(Per Day)	\$67	\$113	\$78	\$77	\$60	\$58	\$99	\$92	\$33	\$91	\$74	\$79
(Number of Respondents)	(2,470)	(492)	(432)	(131)	(421)	(94)**	(69)**	(300)	(31)**	(31)**	(439)	(609)
MEAN ITEMIZED EXPENDITURES IN U.S.*												
(NUMBER OF RESPONDENTS)	(2,470)	(492)	(432)	(131)	(421)	(94)**	(69)**	(300)	(31)**	(31)**	(439)	(609)
TRANSPORT IN U.S.	\$226	\$152	\$170	\$236	\$205	\$299	\$342	\$386	\$418	\$289	\$213	\$214
LODGING IN U.S.	\$290	\$234	\$318	\$415	\$291	\$338	\$550	\$232	\$244	\$374	\$369	\$257
FOOD, BEVERAGES	\$324	\$213	\$314	\$452	\$340	\$307	\$568	\$347	\$308	\$420	\$400	\$284
GIFTS, SOUVENIRS	\$326	\$330	\$217	\$237	\$294	\$417	\$169	\$483	\$341	\$301	\$399	\$312
ENTERTAINMENT	\$172	\$145	\$167	\$193	\$224	\$214	\$154	\$232	\$78	\$124	\$235	\$181
OTHER	\$62	\$71	\$37	\$38	\$78	\$73	\$40	\$119	\$25	\$85	\$153	\$68
AVERAGE NIGHTS IN U.S.	21.5	10.4	16.0	20.5	24.1	28.7	18.5	20.0	46.6	17.6	24.3	17.4
AVERAGE NIGHTS IN CALIF.	10.8	7.7	8.5	10.3	10.9	20.5	8.2	14.9	12.6	11.5	11.5	9.6
MEDIAN NIGHTS IN CALIFORNIA	7.0	4.0	6.0	8.0	6.0	10.0	6.0	7.0	4.0	7.0	7.0	6.0

*Overseas visitors on exclusive tour packages were excluded.

**Caution - Small sample size.

Source: ITA/OTTI Survey of International Air Travelers, 2002.

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Table 37

EXPENDITURES
OVERSEAS LEISURE VISITORS WHO REPORTED ONLY CALIFORNIA DESTINATIONS*
(2002)

- Approximately 42 percent of overseas leisure visitors to California did not visit any other state in the U.S. The California-only leisure visitors reported spending \$2,373 per capita on their entire trip, slightly lower than the \$2,509 spent in 2001. Approximately half of their total trip expenditures were in California (\$1,209).
- Average daily California expenses for California-only leisure visitors was \$74, down 12% from \$84 per day reported in 2001.

<u>AVERAGE PER VISITOR TRIP EXPENDITURES</u>	<u>ALL CALIFORNIA-ONLY VISITORS</u>
TOTAL TRIP	\$2,373
(NUMBER OF RESPONDENTS)	(918)
INCLUSIVE TOUR PRICE	\$1,875
(NUMBER OF RESPONDENTS)	(138)
INTERNATIONAL AIRFARE	\$1,106
(NUMBER OF RESPONDENTS)	(1,150)
EXPENDITURE IN CALIFORNIA	\$1,209
PER DAY	\$74
(NUMBER OF RESPONDENTS)	(1,140)
<u>AVERAGE ITEMIZED EXPENDITURES IN CALIFORNIA</u>	
(NUMBER OF RESPONDENTS)	(1,140)
TRANSPORT IN U.S.	\$160
LODGING	\$207
FOOD, BEVERAGES	\$265
GIFTS, SOUVENIRS	\$352
ENTERTAINMENT	\$136
OTHER	\$58
<u>AVERAGE NIGHTS IN CALIFORNIA</u>	13.1

*Overseas visitors could report up to seven U.S. destinations.

Source: ITA/OTTI Survey of International Air Travelers, 2002.

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APPENDIX A

SURVEY BACKGROUND

Introduction

This report on overseas visitors to California is based on data compiled from the Office of Travel & Tourism Industries (ITA – OTTI), Survey of International Air Travelers. The survey information is collected from passengers through questionnaires covering the traveler, the air trip, activities and places visited, and air travel expenditures.

The survey is conducted voluntarily by selected major airlines on a sample of their international flights departing from U.S. airports. This survey program was initiated in response to a growing need for information on the volume, characteristics, and travel patterns of international air travelers to and from the United States. The data from the survey are used to guide planning oriented toward the activities of international air travelers for both the public and private sectors.

Questionnaire Content

The survey questionnaire is designed to obtain responses from U.S. as well as non-U.S. residents. The questionnaire contains questions about the travelers (e.g., age, sex, family income, country and city of residence, previous travel experience, etc.). It also contains many basic questions about the current trip (e.g., type of air ticket, travel party composition, nights away from home, trip purpose, etc.).

The distinguishing features of this questionnaire are the complete trip itinerary and the trip expenditure data items. These items collect more complete data on these areas than are available elsewhere. Every major destination visited is covered, as is the length of stay and the type of accommodations utilized. Travel expenditures are also covered by type of expenditure. The entire questionnaire is reproduced in Appendix B.

Survey Operations

Data are collected monthly through in-flight passenger surveys conducted on a sample of the participating airlines' scheduled international flights that depart from United States airports during the seven days beginning with the third Monday of the month. Participating airlines receive advance listings of the flights to be surveyed, followed by a survey kit for each sample flight. The kits each contain instructions and questionnaires in the appropriate language. (The questionnaire is available in English, French, German, Italian, Japanese, Spanish, Korean and Chinese).

Airline cabin personnel distribute the self-administered questionnaires to all adult passengers and collect the completed forms prior to debarkation.

Sample Design

The sample is designed around the geographic detail desired for the resulting estimates and the specific airlines willing to participate in the survey. The design is a stratified, two-stage cluster sample, where scheduled flights are randomly selected from strata defined by airline and foreign destination in the first stage of the sample. When the survey is conducted on a selected flight, those passengers who respond are considered to represent all passengers on that flight.

Understanding the Estimates

Since airline participation is voluntary and changes from quarter to quarter, country level data should be viewed cautiously. For example, if a major carrier for a particular country was unable to participate for a quarter, the data for that country may not fully represent the country's international travel.

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With the exception of the number of respondents, all the data in the tables are statistical estimates, based on responses to the survey and supplemented with data from the Immigration and Naturalization Service. Passengers on charter flights and persons traveling by air between the U.S. and Canada are excluded.

The estimates are subject to a certain amount of error resulting from the sampling, data collection, and estimation processes. Because of the complicated nature of the sample design and the resulting computational burden, sampling variability has not been calculated for the estimates. Instead, an indication of the reliability of a set of related estimates is given by the number of respondents to the relevant questionnaire items. The reader must exercise judgment in determining the amount of confidence to place in an estimate and in its proper use. For example, an estimate based on 500 respondents is more reliable than one based on 200 respondents. Several kinds of estimates appear in the tables. The majority are in the form of percent distributions of the responses to questionnaire items. Distributions for items allowing only one choice of response will total to 100 percent. Those allowing more than one choice may total to more than 100 percent. Where the symbol "--" appears, this means that no or limited data is available for that response.

In addition to estimates of percents, estimates of means and medians are shown for travel party size, age, annual family income, number of nights stayed and by type of accommodations.

Definitions

Notes of explanation for selected variables appearing in the row headings of the tables are given below.

Residence of Visitors: In the overseas tables the major traffic-generating countries are listed by world regions, as described in Appendix C. Countries not listed are combined by region into the "Other Region X" categories.

Type and Size of Travel Party: A travel party can fall into only one of these categories: traveling alone; family group; business group; and mixed business, family, and other. These four categories total 100 percent. A party is classified as mixed if the party is a combination of two or more of the other categories. Mean and median party size are computed from the distribution of frequencies of parties of different sizes (for example, three passengers traveling together are counted as a single party in the frequency distribution from which mean and median party size are computed).

Air Expenditures: The amounts shown for mean international airfare and mean expenditures while in the United States on this trip are those amounts spent over and above any inclusive tour expenditures paid prior to beginning the trip. The categories are mutually exclusive.

Mean: The mean is the sum of all responses divided by the number of responses.

Median: The median is that value for which 50 percent of the values lie below it and 50 percent are above it.

Leisure Visitors: Are defined as those visitors whose main purpose of trip is vacation/holidays or visiting friends/relatives.

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APPENDIX B
QUESTIONNAIRE

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**UNITED STATES DEPARTMENT OF COMMERCE
United States International Trade Administration**

**SURVEY OF
INTERNATIONAL
AIR TRAVELERS**

DEPARTING THE UNITED STATES

Dear International Traveler:

Please help the travel industry improve the services they offer you. The information collected in this survey is used by airlines, travel agents, hotels, government travel offices, and other travel planners and providers to understand you, the international traveler, and thereby take steps to improve your next international trip.

This questionnaire is designed to be completed by both non-U.S. residents who have visited the country and U.S. residents traveling abroad. If you are 18 years of age or older, please complete this voluntary survey. **ONLY ONE RESPONSE PER FAMILY GROUP, PLEASE.**

Upon completing this survey, please return it to the person who provided it to you. The estimated average time to complete this questionnaire is 15 minutes. Should you have any comments regarding this survey, please send them to Tourism Industries, ITA, Washington DC 20230, or Office of Information and Regulatory Affairs, OMB, Project 0605-0007, Washington, DC 20503.

Thank you for your cooperation on this important survey.

This survey also available in Japanese, French, German, Spanish, Chinese, Korean, Polish, Portuguese, Russian, Italian.

OMB CLEARANCE NO. 0605-0007

ONLY ONE RESPONSE PER FAMILY, PLEASE

- 1a. Date
- b. Name of Airline
- c. Flight Number
- d. Please rate your general impression of this airline.

Mark (X) ONE

- ☐ Excellent
- ☐ Good
- ☐ Average
- ☐ Fair
- ☐ Poor

- 2a. What are your City, State, ZIP (postal) Code, and Country of Residence? - *Specify*

- b. If this flight is part of an outbound journey from your home, what will be the main destination on your trip? - *Specify*

- c. For NON-US Residents ONLY
If this flight is part of the return journey to your home, what was the main destination that you visited since you left home? - *Specify*

- 3a. What is your country of CITIZENSHIP? - *Specify*

- b. What is your country of BIRTH?

US Residents – SKIP to question 4b

- 4a. For Non-US Residents ONLY
At what city or airport did you pass through U.S. Customs/Immigration? - *Specify*

- 4b. If you are a US resident, at what city or airport will you pass through U.S. Customs/immigration when

you return?

--- *Specify*

- 5a. At what airport did or will you board this aircraft today?

--- *Specify*

- b. Did you make a connecting flight?

☐ No

☐ Yes – From which airport? - *Specify*

- c. At which airport will you leave this aircraft? - *Specify*

- d. Once there, are you making a connecting flight?

☐ No

☐ Yes – To which City? --*Specify*

6. How did you obtain information used to plan your trip?

Mark (X) ALL that apply

- ☐ Airlines directly
- ☐ In-flight information systems
- ☐ National government tourist office
- ☐ State/City travel office
- ☐ Friends or relatives
- ☐ Travel agency
- ☐ Travel guides
- ☐ Tour company
- ☐ Corporate travel department
- ☐ Newspaper/Magazine
- ☐ TV/Radio
- ☐ Personal computer

7. How long before you departed on this trip did you –

Decide to travel?

Make airline reservation?

8. How were your AIRLINE reservations for this trip made?

Mark (X) ONE

- ☐ A travel agent
- ☐ Travel club
- ☐ The Airline directly
- ☐ The company's travel department
- ☐ Tour operator
- ☐ Personal computer
- ☐ Don't know
- ☐ Other

9a. Were commercial LODGING reservations made for this trip before you left home?

Mark (X) ONE

- ☐ Yes – Go to question 9b
☐ No – SKIP to question 10a

b. These reservations were made through.....

Mark (X) ALL that apply

- ☐ A travel agent
☐ The hotel/motel staff directly
☐ The company's travel department
☐ A tour operator
☐ Airline staff
☐ A friend or relative
☐ Business associate
☐ Other

10a. What is/was the MAIN purpose of your trip?

Mark (X) ONE

- ☐ Business/Professional
☐ Convention/Conference/Trade show
☐ Leisure/Recreation/Holidays/Sightseeing
☐ Visit friends/Relatives
☐ Government affairs/Military
☐ Study/Teaching
☐ Religion/Pilgrimages
☐ Health treatment
☐ Other – Specify --

CONTINUE WITH QUESTION 10B

10b. Does this trip have any other purposes?

Mark (X) ALL that apply

- ☐ Business/Professional
☐ Convention/Conference/Trade show
☐ Leisure/Recreation/Holidays/Sightseeing
☐ Visit friends/Relatives
☐ Government affairs/Military
☐ Study/Teaching
☐ Religion/Pilgrimages
☐ Health treatment
☐ Other – Specify --

11. With whom are you traveling now?

Mark (X) ALL that apply

- ☐ Spouse
☐ Family/Relatives
☐ Business associate(s)
☐ Friend(s)
☐ Tour group
☐ Traveling alone

12. Altogether, how many adults and/or children are in your travel party? Exclude your tour group members unless you knew them and planned to travel with them prior to booking the tour.

Number of adults

Number of children

Under 18 years old

13. How many nights away from home will you spend or have you spent on this trip?

Number of nights in the USA

(including U.S. territories)

Number of nights outside

USA

14. IN ORDER OF VISIT, list the principal places visited or to be visited on this trip. and indicate the number of nights at each place. Under number nights, if you did not or will not stay overnight at a place visited, enter "0". Under the section for type of lodging, indicate the lodging company name, or check the appropriate space

Destinations (Cities/Attractions) Enter ONLY ONE destination per line	State or Country	Number of Nights	Type of Lodging Select ONE per line		
			Hotel/Motel Specify name of company	Mark (X)	
				Private Home	Other
1.					
2.					
3.					
4.					
5.					
6.					
7.					

15a. **Is this trip part of a package?** Mark (X) ONE

☐ No --- SKIP to question 16

☐ Yes --- **Which of the following does your package include?**

Mark (X) ALL that apply

- ☐ Airfare
☐ Rental car
☐ Tour escort for entire trip
☐ Cruise
☐ Intercity bus/Coach transportation
☐ Commercial guided tours
☐ Commercial lodging – **How many nights lodging are included?**

b. **How many days prior to departure was this package booked?**

---Specify

c. **What is the approximate cost of your prepaid package?**

Please give your answer in U.S. dollars or your own country's currency.

IF OTHER THAN U.S. CURRENCY

Specify country of currency used.

16. **About your trip expenditures... please estimate the amount of money spent, or expected to be spent for the following items.** Please remember your name is not on this form. Your cooperation in completing this important question is appreciated.

a. **Please estimate how much money you spent, or will spend, outside your own country.** Do not include those items which were covered in the package mentioned in 15c above. --- Specify

b. **Country of currency used for estimate** ---Specify

c. **How many people are covered by this expenditure estimate?**

Specify total number of people.

d. **What was the total cost of your international air travel tickets? –**

Specify

☐ Mark (X) here if you do NOT know cost of tickets.

e. **Are these ONE WAY tickets?**

Mark (X) ONE

☐ Yes

☐ No

f. **How much did you spend at the airport of your USA departure? –**

Specify

U.S. Residents – SKIP to question 17.

For Non-U.S. Residents ONLY

g. Of the total expenditure given in 16a,

Please estimate how much was spent in the USA. --- Specify

h. Of the total expenditure given in 16g above, **please estimate how much was for---**

1. **Transportation**

2. **Lodging**

3. **Foods and beverages**

4. **Gifts, souvenirs and other purchases**

5. **Entertainment and recreation**

6. **Other spending (if any)**

17. Please tell us about how you did, or will, pay for your expenses on this trip--

Type of payment	Percentage paid For expenses	Company(ies) of issue
Credit card(s)	%	
Travelers check(s)	%	
Debit card(s)	%	
Cash	%	
TOTAL	100%	

18. What types of transportation did you, or will you, use when reaching your destination on this trip?

Mark (X) ALL that apply

- ☐ Airlines within the USA
- ☐ Airlines outside the USA
- ☐ Railroad between cities
- ☐ Rented auto --- *Specify company name*

- ☐ Taxi/Cab/Limousine
- ☐ City subway/Tram/Bus
- ☐ Bus between cities
- ☐ Company or private auto
- ☐ Motor home/Camper

19. Which of the following leisure activities did you, or will you, spend time on during this trip?

Mark (X) ALL that apply

- ☐ Shopping
- ☐ Dining in restaurants
- ☐ Amusement/Theme parks
- ☐ Visiting historical places
- ☐ Visiting casinos/Gambling
- ☐ Commercial guided tours
- ☐ Visiting small towns and villages
- ☐ Cultural heritage sights/Activities
- ☐ Touring the countryside
- ☐ Water sports/Sunbathing
- ☐ Ranch vacations
- ☐ Cruises
- ☐ Hunting/Fishing
- ☐ Snow skiing
- ☐ Golfing/Tennis
- ☐ Environmental/Ecological excursions
- ☐ Visiting national parks
- ☐ Visiting American Indian communities
- ☐ Attending sports event
- ☐ Concert/Play/Musical
- ☐ Art gallery/Museum
- ☐ Sightseeing in cities
- ☐ Nightclubs/Dancing
- ☐ Ethnic heritage sights/Activities

20. Please rate this airline for this trip on each of the following attributes.

	Excellent	Good	Average Did Not Use	Fair	Poor	
a. Convenient schedule 0 <input type="checkbox"/>	5 <input type="checkbox"/>	4 <input type="checkbox"/>	3 <input type="checkbox"/>	2 <input type="checkbox"/>	1 <input type="checkbox"/>	
b. Ticket price	5 <input type="checkbox"/>	4 <input type="checkbox"/>	3 <input type="checkbox"/>	2 <input type="checkbox"/>	1 <input type="checkbox"/>	0 <input type="checkbox"/>
c. Reservation service	5 <input type="checkbox"/>	4 <input type="checkbox"/>	3 <input type="checkbox"/>	2 <input type="checkbox"/>	1 <input type="checkbox"/>	0 <input type="checkbox"/>
d. Check-in waiting time	5 <input type="checkbox"/>	4 <input type="checkbox"/>	3 <input type="checkbox"/>	2 <input type="checkbox"/>	1 <input type="checkbox"/>	0 <input type="checkbox"/>
e. Check-in personnel	5 <input type="checkbox"/>	4 <input type="checkbox"/>	3 <input type="checkbox"/>	2 <input type="checkbox"/>	1 <input type="checkbox"/>	0 <input type="checkbox"/>
f. Airline club/lounge	5 <input type="checkbox"/>	4 <input type="checkbox"/>	3 <input type="checkbox"/>	2 <input type="checkbox"/>	1 <input type="checkbox"/>	0 <input type="checkbox"/>
g. On-time departure	5 <input type="checkbox"/>	4 <input type="checkbox"/>	3 <input type="checkbox"/>	2 <input type="checkbox"/>	1 <input type="checkbox"/>	0 <input type="checkbox"/>
h. Food/Beverage quality	5 <input type="checkbox"/>	4 <input type="checkbox"/>	3 <input type="checkbox"/>	2 <input type="checkbox"/>	1 <input type="checkbox"/>	0 <input type="checkbox"/>
i. Flight attendant service	5 <input type="checkbox"/>	4 <input type="checkbox"/>	3 <input type="checkbox"/>	2 <input type="checkbox"/>	1 <input type="checkbox"/>	0 <input type="checkbox"/>
j. Audio/Video	5 <input type="checkbox"/>	4 <input type="checkbox"/>	3 <input type="checkbox"/>	2 <input type="checkbox"/>	1 <input type="checkbox"/>	0 <input type="checkbox"/>
k. Cabin cleanliness	5 <input type="checkbox"/>	4 <input type="checkbox"/>	3 <input type="checkbox"/>	2 <input type="checkbox"/>	1 <input type="checkbox"/>	0 <input type="checkbox"/>
l. Cabin noise level	5 <input type="checkbox"/>	4 <input type="checkbox"/>	3 <input type="checkbox"/>	2 <input type="checkbox"/>	1 <input type="checkbox"/>	0 <input type="checkbox"/>
m. Seat comfort	5 <input type="checkbox"/>	4 <input type="checkbox"/>	3 <input type="checkbox"/>	2 <input type="checkbox"/>	1 <input type="checkbox"/>	0 <input type="checkbox"/>
n. Cabin layout	5 <input type="checkbox"/>	4 <input type="checkbox"/>	3 <input type="checkbox"/>	2 <input type="checkbox"/>	1 <input type="checkbox"/>	0 <input type="checkbox"/>
o. Carry-on storage space	5 <input type="checkbox"/>	4 <input type="checkbox"/>	3 <input type="checkbox"/>	2 <input type="checkbox"/>	1 <input type="checkbox"/>	0 <input type="checkbox"/>
p. Overall evaluation of aircraft	5 <input type="checkbox"/>	4 <input type="checkbox"/>	3 <input type="checkbox"/>	2 <input type="checkbox"/>	1 <input type="checkbox"/>	0 <input type="checkbox"/>
q. Overall evaluation of flight	5 <input type="checkbox"/>	4 <input type="checkbox"/>	3 <input type="checkbox"/>	2 <input type="checkbox"/>	1 <input type="checkbox"/>	0 <input type="checkbox"/>

21. Would you choose or recommend this airline for your next trip on this route?

Mark (X) ONE

- ☐ Definitely would
☐ Probably would
☐ Probably would not
☐ Definitely would not
☐ Not sure

22. What were your three main reasons for flying on THIS AIRLINE? Indicate by marking "1" for the most important reasons, "2" for the next most important reason, and "3" for the third most important reason. DO NOT indicate more than three reasons.

<input type="checkbox"/> Airfare	<input type="checkbox"/> On-time reputation
<input type="checkbox"/> Convenient schedule	<input type="checkbox"/> Previous good experience
<input type="checkbox"/> Non-stop flights	<input type="checkbox"/> Mileage bonus/Frequent flyer program
<input type="checkbox"/> Employer policy	<input type="checkbox"/> In-flight service reputation
<input type="checkbox"/> Safety reputation	<input type="checkbox"/> Not involved in choice of carrier
<input type="checkbox"/> Loyalty to carrier	<input type="checkbox"/> Other ----- Specify

23a. Where are you sitting today?

Mark (X) ONE

- ☐ First class
☐ Executive/Business class
☐ Economy/Tourist/Coach

b. What type of airline ticket do you have?

Mark (X) ALL that apply

- ☐ First class
☐ Executive/Business class
☐ Economy/Tourist/Coach
☐ Frequent flyer free ticket
☐ Frequent flyer upgrade
☐ Discount/Group fare
☐ Non-revenue
☐ Don't know

- 24. Please rate the following attributes of the AIRPORT from which you have just departed (or are currently waiting to depart) the United States.**
Mark (X) ONE rating for each

	Excellent	Good	Average Did Not Use	Fair	Poor	
a. Airport access	5 <input type="checkbox"/>	4 <input type="checkbox"/>	3 <input type="checkbox"/>	2 <input type="checkbox"/>	1 <input type="checkbox"/>	0 <input type="checkbox"/>
b. Ground transportation	5 <input type="checkbox"/>	4 <input type="checkbox"/>	3 <input type="checkbox"/>	2 <input type="checkbox"/>	1 <input type="checkbox"/>	0 <input type="checkbox"/>
c. Airport terminal convenience	5 <input type="checkbox"/>	4 <input type="checkbox"/>	3 <input type="checkbox"/>	2 <input type="checkbox"/>	1 <input type="checkbox"/>	0 <input type="checkbox"/>
d. Airport terminal cleanliness	5 <input type="checkbox"/>	4 <input type="checkbox"/>	3 <input type="checkbox"/>	2 <input type="checkbox"/>	1 <input type="checkbox"/>	0 <input type="checkbox"/>
e. Concession goods/Services	5 <input type="checkbox"/>	4 <input type="checkbox"/>	3 <input type="checkbox"/>	2 <input type="checkbox"/>	1 <input type="checkbox"/>	0 <input type="checkbox"/>
f. Concession prices	5 <input type="checkbox"/>	4 <input type="checkbox"/>	3 <input type="checkbox"/>	2 <input type="checkbox"/>	1 <input type="checkbox"/>	0 <input type="checkbox"/>
g. Terminal seating availability	5 <input type="checkbox"/>	4 <input type="checkbox"/>	3 <input type="checkbox"/>	2 <input type="checkbox"/>	1 <input type="checkbox"/>	0 <input type="checkbox"/>
h. International Traveler facilities	5 <input type="checkbox"/>	4 <input type="checkbox"/>	3 <input type="checkbox"/>	2 <input type="checkbox"/>	1 <input type="checkbox"/>	0 <input type="checkbox"/>
i. Security measures	5 <input type="checkbox"/>	4 <input type="checkbox"/>	3 <input type="checkbox"/>	2 <input type="checkbox"/>	1 <input type="checkbox"/>	0 <input type="checkbox"/>
j. Overall airport evaluation	5 <input type="checkbox"/>	4 <input type="checkbox"/>	3 <input type="checkbox"/>	2 <input type="checkbox"/>	1 <input type="checkbox"/>	0 <input type="checkbox"/>

U.S. residents --- SKIP to question 26a

25 a. For Non-U.S. Residents Only:

When entering the USA, please rate your Immigration and Naturalization Service/Passport Control and U.S. Customs experience at the airport where you entered the USA.

Mark (X) ONE rating for each

	Excellent	Good	Average	Fair	Poor	
	Don't Know					
a. Passport Control						
(1) Processing time	5	4	3	2	1	0
(2) Staff courtesy	5	4	3	2	1	0
b. Customs baggage clearance						
(1) Processing time	5	4	3	2	1	0
(2) Staff courtesy	5	4	3	2	1	0

b. About how long did it take you to clear Passport Control and Customs when entering the United States?

Specify in minutes

Baggage delivery waiting time

Mark (X) ONE rating

- ☐ Excellent
☐ Good
☐ Average
☐ Fair
☐ Poor
☐ Don't know

26a. Did you have personal safety concerns before you started your international trip?

Mark (X) ONE

- ☐ Yes
☐ No

b. Did your concerns cause you to change your travel plans?

Mark (X) ONE

- ☐ Yes
☐ No

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26c. For Non-U.S. Residents ONLY**Was your personal safety actually endangered while in the USA?**

Mark (X) ONE

Ⓐ No – Go to question 27

Ⓑ Yes – Indicate the city(ies) where incidents(s) took place and mark (X) the appropriate category(ies) below.

City	Incidents – Mark (X)					
	Harassment/ Arguments	Assault/ Physical Harm	Burglary/ Theft	Transportation accident	Health Problem	Other -- Specify

27a. Is this your first trip by air to/from the United States?

Mark (X) ONE

Ⓐ Yes – SKIP to question 28

Ⓑ No – Go to question 27b

b. Altogether, how many round trips by air have you made to/from the United States ---

In the past 12 months?

In the past 5 years?

28. Please give us some information about yourself.**a. What is your occupation?**

Mark (X) ONE

Ⓐ Manager/Executive

Ⓑ Professional/Technical

Ⓒ Clerical/Sales

Ⓓ Craftsman/Mechanic/Factory worker

Ⓔ Government/Military

Ⓕ Homemaker/

☐ Retired☐ Student☐ Other -- Specify
b. Age

c. Gender ---Mark (X) ONE☐ Female☐ Male**29. What is the total combined yearly income of all members of your household? Give your answer either in USA dollars or in your own country's currency. Please specify the country of currency if NOT USA dollars.**

In USA dollars ---

OR

In currency other than USA dollars –

Specify

Mark (X) ONE

☐ Under \$20,000☐ \$20,000 - \$39,999☐ \$40,000 - \$59,999☐ \$60,000 - \$79,999☐ \$80,000 - \$99,999☐ \$100,000 – \$119,999☐ \$120,000 – \$139,999☐ \$140,000 -- \$159,999☐ \$160,000 -- \$179,999☐ \$180,000 -- \$199,999☐ \$200,000 and aboveTotal annual
household income

Country of currency

**THANK YOU FOR COMPLETING THIS QUESTIONNAIRE.
WE HOPE YOUR TRIP WAS OR WILL BE AN ENJOYABLE ONE.**

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APPENDIX C

WORLD BY REGION AND COUNTRY OR TERRITORY

Mexico

Mexico City
Guadalajara
Monterey
Acapulco
Other Mexico

Central America

Belize
Costa Rica
El Salvador
Guatemala
Honduras
Nicaragua
Panama
Republic
San Andres
Island

South America

Argentina
Bolivia
Brazil
Chile
Columbia
Ecuador
French Guiana
Guyana
Paraguay
Peru
Surinam
Uruguay
Venezuela

Caribbean

Anguilla Island
Antigua
Bahama Island
Barbados
Bermuda
Cuba
Dominica
Dominican Republic
Grand Cayman
Grenada
Guadeloupe
Haiti
Jamaica
Martinique
Montserrat Island
Neth. Antilles
Nevis
Providential Islands
St. Barthelemy
St. Kitts
St. Lucia
St. Vincent
Trinidad/Tobago
Turks/Calcos
Virgin Islands/UK

Europe

Austria
Belgium
Czechoslovakia
Denmark
Finland
France
Germany
Greece
Hungary
Iceland
Ireland
Italy
Luxembourg
Malta
Netherlands
Norway
Poland
Portugal
Rumania
Spain
Sweden
Switzerland
U.S.S.R.
United Kingdom
Yugoslavia

Africa

Cameroon
Canary Islands
Cape Verde Island
Gabon
Ghana
Ivory Coast
Kenya
Liberia
Morocco
Nigeria
SW Africa/S. Africa
Senegal
Togo
Zambia

Middle East

Egypt
Bahrain
Cyprus
Iran
Iraq
Israel
Jordan
Kuwait
Lebanon
Saudi Arabia
Syria
Turkey
United Arab Emirate

Far East

China/Mainland
China/Taiwan
Hong Kong
India
Indonesia
Japan
Korea-South
Malaysia
Okinawa/Ry Island
Pakistan
Philippines
Singapore
Thailand

Oceania

Australia
Cook Islands
Fiji Islands
French Polynesia
Kiribati
Nauru Republic
New Zealand
Papua/New Guinea

